# iHRIS Manage User's Manual

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# Introduction to iHRIS Manage

# iHRIS:Understanding iHRIS Manage

iHRIS Manage is a human resources management tool that enables an organization to design and manage a comprehensive human resources strategy. iHRIS Manage helps an organization manage its workforce more effectively and efficiently, while reducing costs and data errors. Using the system, the HR professional can create a hierarchy of positions for an organization based on standard titles, job classifications and job descriptions, even spread over diverse geographic locations, offices and facilities. HR staff can solicit job applications for open positions, assign employees to fill positions and maintain a searchable database of all employees, their identifying information and their qualifications. Managers can track each employee's history with the organization, including their position and salary histories, and record the reason for departure when the employee leaves.

A decision maker within the organization can analyze this data to answer key human resource management and policy questions, such as:

- Are employees deployed in positions that match their qualifications and education?
- Are employees optimally deployed in locations to meet needs?
- How many workers need to be recruited to fulfill anticipated vacancies?
- Are pay rates equitable across similar jobs?
- Are employees being promoted in alignment with competencies?
- What are the reasons for employee attrition?

iHRIS Manage is primarily intended to be used to manage health care workers employed by a country's Ministry of Health, a hospital or other large health care organization, or a private provider of health care services. However, it may be readily adapted to other types of organizations and workforces.

## Modules and Features

Version 4.0 of iHRIS Manage consists of several key modules designed to store and report position, employee and job applicant information:

- **User Management:** Create and manage password-protected user accounts to control access to the system. Accounts are role-based so that non-authorized user actions and data sets are hidden from the user.
- **System Configuration:** Turn on and off modules and set options for each module to customize the system and its features.
- **Database Management:** Design a standard data structure by creating lists of items to be tracked in the database such as geographical locations, offices and facilities.
- **Position Management:** Create positions with standardized descriptions, codes and qualifications within the organizational structure and manage the hiring, transfer and promotion process.
- **Applicant Management:** Record information about a job applicant, including interview notes, and log hiring decisions.
- **Employee Management:** Match an employee to a position, record important information about an employee and maintain a record of the employee's complete work history with the organization.
- **In-service Training Management:** Track in-service trainings that employees have completed and assess competencies and continuing education credits earned from training (turned off by default).

- **Custom Reporting:** Create reports to aggregate and analyze data in a variety of ways to answer key management and policy questions as well as generate staff lists and directories.
- **Search:** Search for employee and applicant records in the system.

The following features ensure security and accuracy of data stored in the system:

- Error checking and data correction by authorized data managers to ensure data integrity
- Automated logging of the username, date and time when data are entered or changed for auditing purposes
- Permanent archiving of all data changes to ensure a consistent record of each employee's history with the organization

iHRIS Manage will be extensible to the Capacity Project's other iHRIS products, iHRIS Qualify, a certification and licensing management system for health professionals, and iHRIS Plan, workforce modeling and planning software. Both of these systems are currently under development.

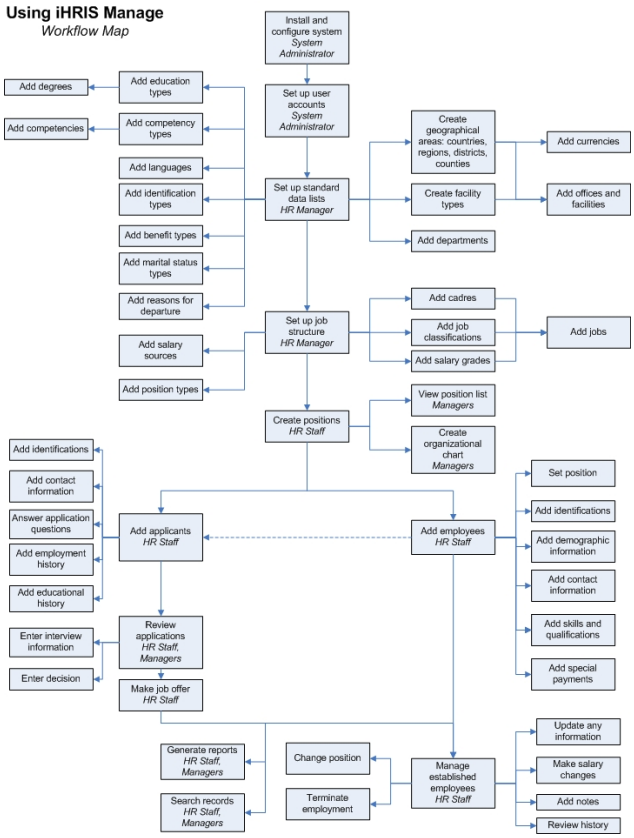
## User Roles

Five user roles can be assigned in iHRIS Manage. The user role limits the activities that the person can perform in the system and helps enforce data quality and management protocols.

- **System Administrator** is responsible for ensuring that system security procedures are enforced and for keeping the system maintained and functioning. The System Administrator can view any record and perform any action in the system. The System Administrator also configures the system, defines high-level reports and manages the user accounts.
- **HR Manager** is a manager of human resources personnel and is responsible for managing all system data and for ensuring that data in the system are complete, correct and up to date. The HR Manager can view and enter data in any record. The HR Manager defines reports and analyzes data in order to make organizational or individual HR decisions. In addition, the HR Manager is the only role (other than the System Administrator) that can create standard lists of data, configure the system's job structure and correct data entered in the system.
- **HR Staff** is a data entry person in human resources who is responsible for entering and updating data in the system. The HR Staff role can view and enter data in any record in the system and can view reports. However, the HR Staff role cannot correct erroneous information, define reports or create standard lists of data. The integrity of the data entered by HR Staff is enforced by the HR Manager.
- **Executive Manager** may manage the entire organization or one district, department, office or facility within the organization. The Executive Manager views reports and analyzes data entered in the system in order to make HR decisions and set organizational policy. The Executive Manager can view any record in the system, review job applications and access all reports but cannot update or change data entered in the system.
- **Training Manager** manages in-service training programs for employees and updates employee competencies gained by training. The Training Manager can only update the Trainings section of an employee's record. (These functions may also be completed by HR Managers or HR Staff.)

# System Functions

The diagram below illustrates the flow of actions through the iHRIS Manage system from the time of initial installation and configuration to ongoing maintenance of employee records. The role that performs each action is listed in italics underneath the action. Actions should be performed in the general order indicated, although updates and changes can be made at any time.




The following system functions are supported by Version 4.0 of iHRIS Manage.

## System administration functions

**Install and configure system:** The System Administrator installs the system files and accesses the configuration screen to set global system options, install and turn on modules, and set options for modules.

**Set up user accounts:** The System Administrator creates password-protected user accounts for all authorized users of the system and assigns each user a role. If the user information changes, the System Administrator updates the user account. If the user no longer has access to the system, the System Administrator disables the user account.

## Database management functions

**Set up standard data lists:** The HR Manager determines which specific data items to track and report on in the system, and updates lists to include those items. These lists determine the selection items in dropdown menus used when creating employee records and define the data standards used by the organization. These lists include offices, facilities and departments used in the organization; items used to define employee characteristics and competencies, such as marital status; geographical locations; and training courses offered to employees.

## Position management functions

**Set up job structure:** The HR Manager creates a job structure to match the organizational structure by defining the cadres, job classifications, salary grades and jobs used within the organization.

**Create positions:** HR Staff or the HR Manager creates positions that exist in the organization. Each position is linked to a job, and there may be several positions for each generic job. A position is filled by one employee and represents one spot on the organizational chart. Positions marked as "open" are available to be filled by an existing employee or job applicant.

## Employment management functions

**Add employee:** At any time, HR Staff can add a person to the system as an employee. This includes recording the employee's name, nationality and geographical area of residence, as well as information about the employee, such as identification numbers, demographic information and contact information. In addition, the employee's qualifications and educational and employment history may be recorded.

**Manage employees:** HR Staff record any updates or changes to an employee's information when they occur, including changes in position or salary, termination of employment and a log of notes about the employee. HR Staff, the HR Manager or Executive Managers may review history of name changes, position changes, salary changes and notes at any time.

## Applicant management functions

*Note:* This module may be disabled if not needed. It is enabled by default.

**Add applicant:** When a person applies for an open position at the organization, HR Staff add the applicant as a record in the system with the applicant's name, nationality, geographical area of residence and supporting information, including required identifications, contact information, employment history and educational history. HR Staff can complete a standard job application form for the applicant, as well. Note that current employees may also apply for open positions.

**Review applications and make job offers:** HR Staff, the HR Manager and Executive Managers review the applications for an open position and record notes about each applicant, including interview notes and notes about the decision whether to hire the applicant. Once an applicant has been hired to fill an open position, HR Staff convert the applicant to an employee and assign the position to the person.

## In-service Training Management Functions

*Note:* This module may be disabled if not needed. It is disabled by default.

**Manage a training program:** The Training Manager or HR Manager enters information about available training courses into the system for selection when scheduling employees for training. Training programs include funders of training courses, institutions hosting courses, names and schedules of available courses, competencies earned by taking the course and continuing education credits. Requests for training and evaluations of employees after completing training can also be tracked.

**Schedule an employee for training:** The Training Manager or HR Staff can schedule an employee to take a training course after the training is requested by the employee, the supervisor, HR or some other requestor. Once the employee has completed the course, the Training Manager or HR Staff can evaluate the employee. The evaluation is retained in the employee's evaluation history. If an employee gains new competencies by completing a training course, the Training Manager or HR Staff can asses those competencies after the employee has completed the course. Assessed competencies are then added to the employee's qualifications.

### Search

All users can search the system for employee and position records. They may then review the record on the screen or print a copy.

### Reporting

iHRIS Manage includes a customized report builder that enables System Administrators to define reports based on any data entered in the system. In addition, the system is installed with a large number of pre-defined standard reports that any user can view as a table or chart, export or print.

In addition, System Administrators may export data from iHRIS Manage for use in other instances of the system or in other systems. Data may also be imported into iHRIS Manage.

## Planned Features

Version 4.0 of iHRIS Manage, which this manual accompanies, provides a complete solution for setting up an organization's position structure and managing job applications and employee information. Later releases will support additional modules and functions, including:

- **Customizable roles** to enable System Administrators to create roles other than the five pre-configured roles and assign them tasks that they can perform in the system
- **Customizable headers** to enable database managers to easily change header or field names for their context (i.e., change District to State or Province).
- **Self-service option** to enable employees and supervisors to view and update their records in the system while protecting private and sensitive data

New features and development are ongoing. As this is an Open Source development project, volunteers and other organizations may also contribute to the core code. Check the iHRIS Manage page (http://www.capacityproject.org/hris/suite/ihris_manage.php) on the HRIS Strengthening Website for the most up-to-date list of planned features and a development calendar.

# iHRIS:Before Installing iHRIS Manage

Before installing iHRIS Manage, spend some time collecting data about your organization and its employees. This will enable set up of the necessary data structure for entering data into the system. This section gives guidance on the data that should be collected and provides checklists for recording and organizing the data.

There are four checklists to complete to set up iHRIS Manage:

- Data Setup Checklist
- Define Geographical Locations
- Define a Job Structure
- Set Up Current Positions and Employees

If your organization offers in-service trainings to employees, you may also choose to set up a training program in iHRIS Manage. This module is optional.

## Data Setup Checklist

Before entering data into iHRIS Manage, you must configure lists for selecting standard items. Standardizing these selection lists ensures that data can be reported consistently. Complete the following exercises before beginning to identify and gather all the data needed to complete the setup. This exercise should be completed by an HR Manager.

*Note:* Some data lists are pre-filled when iHRIS Manage is installed. You may use these pre-filled lists as is, or any of these items may be edited to match the standards used in your organization.

### Education types and degrees

List all education types (such as high school, college, university, professional) and degrees for each education type (such as diploma, bachelor's degree, master's degree, certificate) to track for job applicants and employees.

**Action:** Enter all education types and degrees in the system (see Add an education type and Add a degree).

### Languages

Do you want to track employees' language skills--their proficiency at reading, writing and speaking non-native languages? List all languages to track.

**Action:** Enter all languages (see Add a language).

### Competency categories and competencies

Is your organization using a competency model to track employee competencies or skills? A *competency* is any skill in which an employee has been assessed to be competent. For easier organization, related competencies can be grouped under the same competency type, or a category of related competencies. When an employee is assessed for a competency, a competency evaluation level can be selected.

List each competency type and all the competencies that belong in each category. List all the levels of competency evaluation used in your organization.

**Action:** Enter all competency types and competencies in the system (see Add a competency type and Add a competency). Enter all competency evaluations used by your organization (see Add a competency evaluation.)

### Identification types

*Identification types* are non-changing IDs, such as a Social Security Number, driver's license, passport or national health insurance card, that are used to identify an employee. Identification numbers are entered into the system when a job applicant completes an application and when an employee is hired. The types of identification that are required depend on the laws of your country and the policies of your organization.

List all identification types that will need to be tracked.

**Action:** Enter all identification types in the system (see Add an identification type).

### Benefit types

Will you be tracking special non-salary payments made to employees, such as benefits, allowances, travel advances or bonuses? List all benefit types, or special payments.

**Action:** Enter all benefits types in the system (see Add a benefit type).

### Marital status types

List the types of marital status--such as single, married, divorced and widowed--you need to track for your employees.

**Action:** Enter all marital status categories in the system (see Add a marital status).

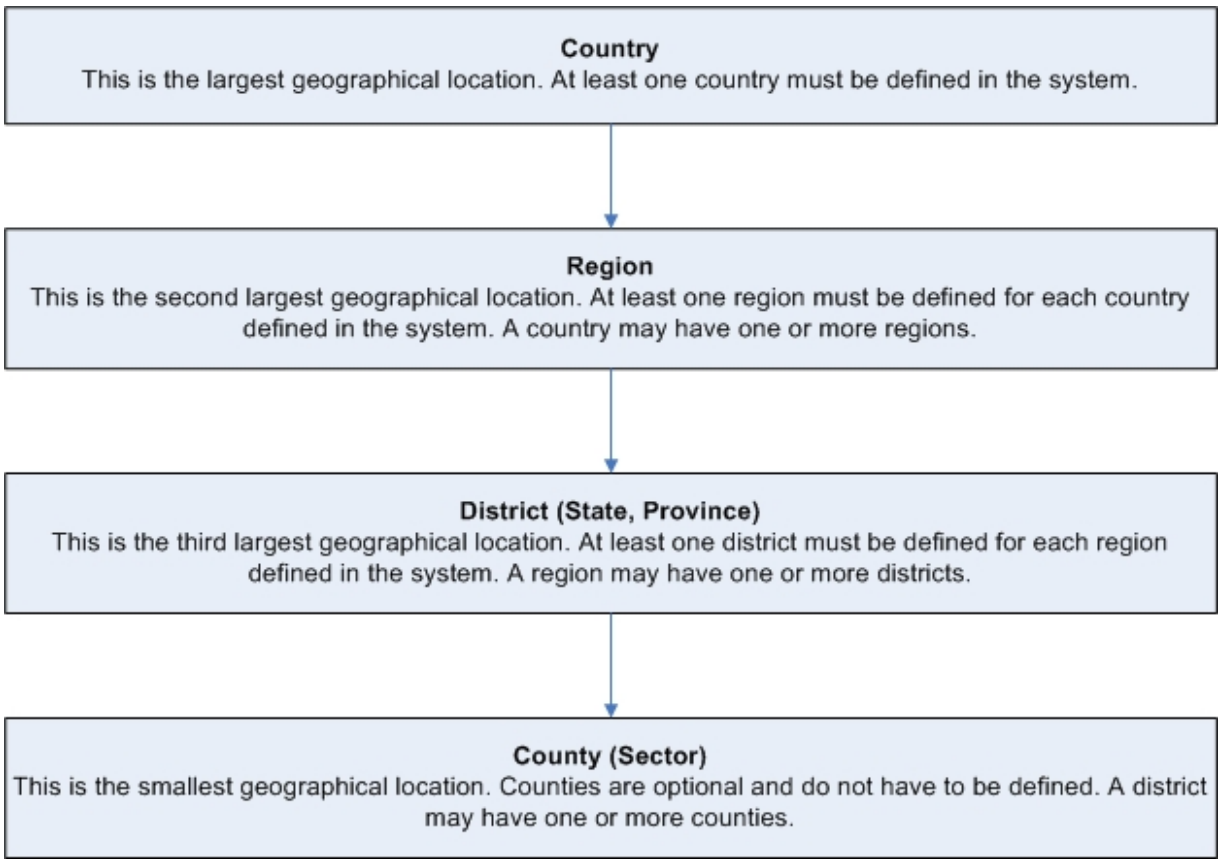
### Reasons for departure

List the reasons for departure that you would like to track when employees leave or change positions within the organization.

**Action:** Enter all reasons for departure in the system (seeAdd a reason for departure).

## Define Geographical Locations

iHRIS Manage can track human resources data by four types of geographical locations. The system reports aggregate data at each level in order to analyze human resources at the national, regional, district and/or county level.


Country
This is the largest geographical location. At least one country must be defined in the system.
Region
This is the second largest geographical location. At least one region must be defined for each country defined in the system. A country may have one or more regions.
District (State, Province)
This is the third largest geographical location. At least one district must be defined for each region defined in the system. A region may have one or more districts.
County (Sector)
This is the smallest geographical location. Counties are optional and do not have to be defined. A district may have one or more counties.

When data with a geographical component is entered in the system, such as an employee's home address or the location of an office or facility, you are first prompted to select a country. The system then displays a list of regions within that country for selection. After selecting a region, the system displays a list of districts within that region, as well as any counties that may have been entered for the district. Choosing the district is required; choosing a county is not, but is useful for tracking data by the smallest geographical subset.

Each office or facility in the organization is linked to a district and, optionally, a county. Each office or facility is assigned a type, which defines the category it belongs in (such as office, hospital or clinic). Positions can then be defined for each office/facility.

## Locations Worksheet

Complete the following exercise for each country where employees are located. This will determine the geographical and office/facility data that need to be entered into the system. This exercise should be completed by an HR Manager.

**Country name:**

**Currency (for employee salaries):**

**Region names:**

*If you are not tracking data by region, enter one country-wide region, such as "National."*

**District/state/province names for each region:**

**County/sector names for each district/state/province (optional):**

**Offices/facilities in the country and type of facility:**

**Departments used by the office/facility or by the organization as a whole (optional):**

## Example Scenarios

The following examples illustrate several scenarios for setting up geographical locations and offices/facilities in the system, depending on your organization's locations and needs.

**1) The organization has one office and does not track data regionally.**

Create a country with the name of the country where the office is located. For that country, enter any meaningful name to signify the one required region, such as "National." For that region, enter the name of the district, state or province where the office is located. For that district, enter the name of the county or sector where the office is located (optional). Enter one facility type, such as "office," to categorize the office. Create an office and enter a meaningful name for the office, such as "Headquarters." Link it to the country, district and county entered.

**2) The organization has several offices or facilities in one country and needs to track data regionally.**

Create a country with the name of the country where the offices/facilities are located. Enter the names of the regions where the offices/facilities are located, or all regions in the country. Enter the names of the districts, states or provinces within each region where the offices/facilities are located, or all districts in the country. Enter the names of the counties or sectors within each district where the offices/facilities are located, or all counties in the country (optional). Enter the names of all offices or facilities, assigned to their specific district and county locations, and categorized by the specific facility types you have defined.

**3) The organization has several offices or facilities in several countries and may need to track data regionally for some.**

Create all countries where offices/facilities are located. For each country where regional data should be tracked, enter the names of the regions within that country. For each country where regional data does not need to be tracked, enter one "region," such as "National." For each defined region, enter the name of at least one district, state or province. Enter the names of counties or sectors within defined districts (optional). Enter the names of all offices or facilities, assigned to their specific country, district and county locations, and categorized by the specific facility types you have defined.

**4) The organization has only office but has personnel assigned to work in several different geographical locations.**

Create all countries where employees are located. For each country, enter the name of at least one region; if regional data does need to be tracked, enter a meaningful name for one region per country, such as "National." For each region, enter the names of all districts, states or provinces where employees are located. Enter the name of counties or sectors where employees are located within defined districts (optional). Configure the system to globally turn off the offices/facilities feature; all positions will be linked to a geographical location instead. (Requires customization by a programmer.)

**Actions:** When you have completed this worksheet, enter into the system, in the following order:

- all countries identified -- at least one must be entered (see Add a country)
- all regions identified for each country -- at least one region per country (see Add a region)
- all districts identified for each region -- at least one district per region (see Add a district)
- all counties identified for each district -- optional (see Add a county)
- all currencies identified -- at least one must be entered (see Add a currency)
- all facility types identified -- at least one type must be entered (see Add a facility type)
- all information about each office or facility in the organization -- at least one office must be entered (see Add an office or facility)
- all departments identified -- optional (see Add a department)

## Define a Job Structure

In iHRIS Manage, a *job* is defined as a general set of qualifications, duties and responsibilities that one person performs in the organization. Each job has a title, code and description.

A job may be categorized by any of the following:

- **Cadre:** a category of health professionals who work for the organization
- **Job classification:** a standard job category and code that may or may not include health professionals
- **Salary grade:** a grade of pay for a job

All of these categorizations are optional. They are intended to organize jobs and track and report on data in ways that are meaningful for your organization.

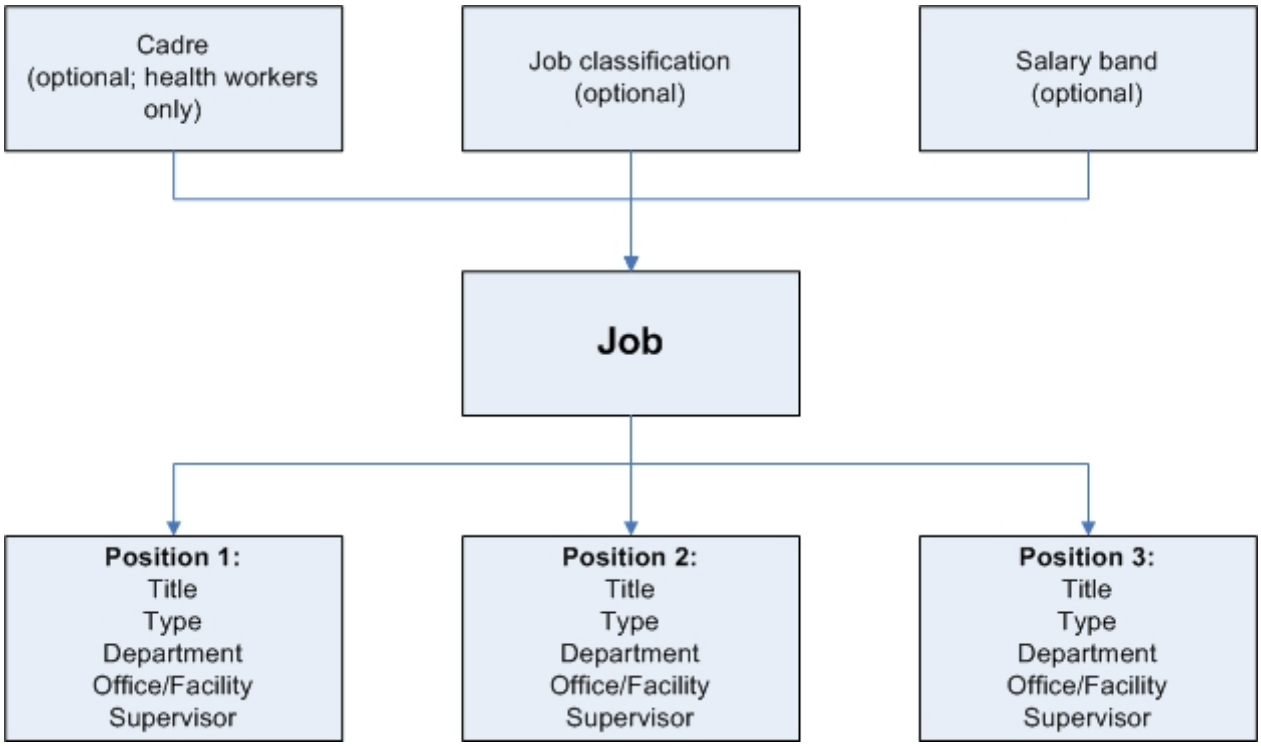
There may be multiple instances of the same job. Each instance, which is filled by a single employee performing that job function, is called a position. The position may have the same title as the job, or it may have an additional position title.

Positions may be:

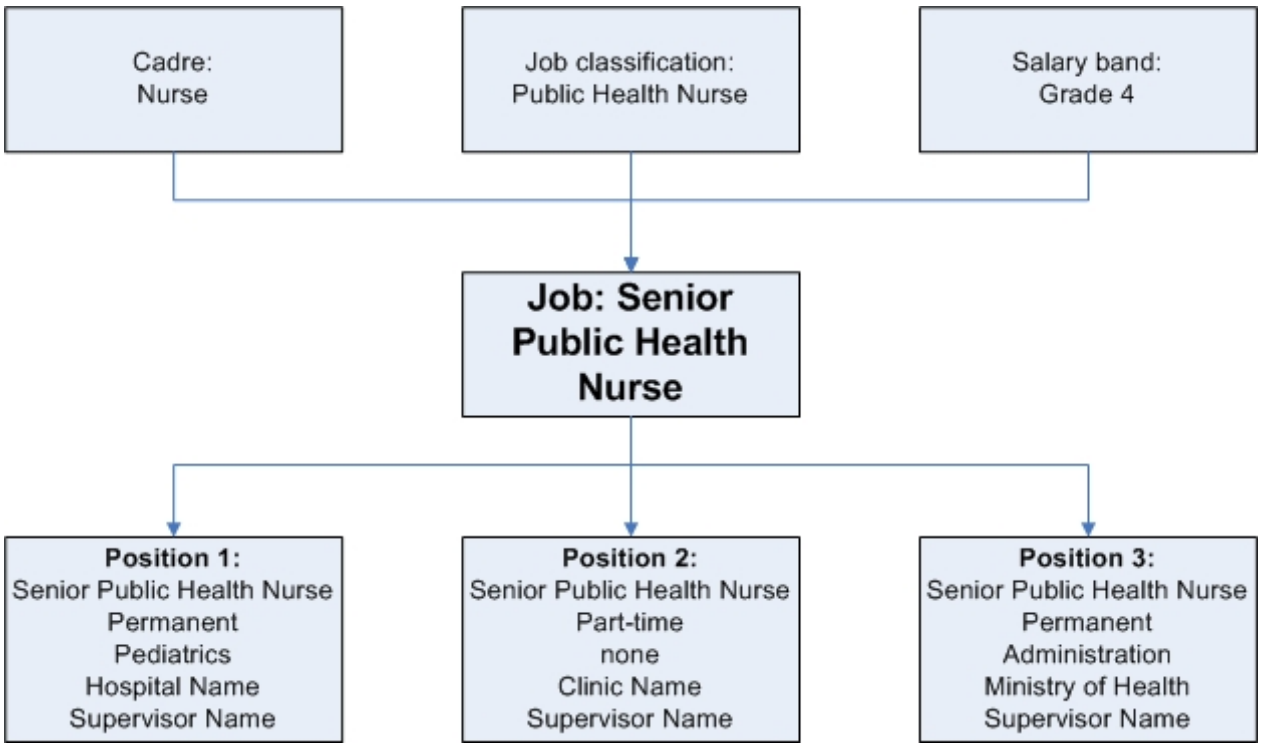
- **Open:** No employee currently holds the position, and the organization is actively accepting applications or seeking to hire into the position.
- **Closed:** An employee currently holds the position.
- **Discontinued:** No employee currently holds the position, and the organization is not seeking to hire into the position, but the position may be reopened at some later date

Each position has one spot on the organizational chart and one supervisor. Each position is located at a particular office or facility. Each position may optionally be assigned a code, department and position type (such as permanent, temporary or part-time).

The following chart illustrates how job data are related in the system:




This is an example of a specific job:




Complete the following exercises to define all cadres, job classifications and salary bands in use in your organization. Then identify each job in the organization and link it to the appropriate cadre, job classification and salary band. This section should be completed by an HR Manager.

## Cadres

List all cadres in use in the organization. *Cadres* refer only to health professionals and should conform to international standards as much as possible. Cadres are optional.

**Action:** Add all cadres to the system (see Add cadres).

## Job classifications

List all job classifications in use in the organization, including a description and a code for each job classification. A *job classification* is a category used to group similar jobs. Job classifications may be the same as cadres but will also include non-health professionals. Job classifications are optional.

**Action:** Add all job classifications and corresponding information to the system (see Add job classifications).

## Salary grades

List all salary grades in use in the organization. Include the currency, starting salary, midpoint (or market rate) and ending salary for each salary grade. A *salary grade* defines the pay range for one or more jobs. Salary grades are optional.

**Action:** Add all salary grades and corresponding information to the system (see Add salary grades).

Currencies also need to be entered into the system (see Add a currency).

### Jobs

List all jobs that currently exist in the organization with their cadre, job classification, salary grade, job code and job description. Remember that a job is not the same as a position. Several positions may exist for one job. Once the jobs are entered in the system, at least one position may be created for each job, which may then be linked to an employee.

**Action:** Enter each job and its corresponding information into the system (see Add jobs).

### Salary sources

List all salary sources. A *salary source* is any distinguishable source of an employee's salary or a special payment or benefit paid to an employee that needs to be tracked. Tracking salary sources is optional.

**Action:** Enter all salary sources in the system (see Add salary sources).

### Position types

List all position types (such as permanent, temporary, consultant, part-time, etc.) to track in the system. Tracking position types is optional.

**Action:** Enter all position types in the system (see Add position types).

## Set Up Current Positions and Employees

Once the standard data lists have been configured in the iHRIS Manage system according to the worksheets "Data Setup Checklist", "Define Geographical Locations" and "Define a Job Structure", you are ready to begin the initial data entry. This involves populating the iHRIS Manage system with all current position and employee information. Print and complete the following checklist first to ensure that all the data is available before entering data into the system. This checklist should be completed by an HR Manager or HR Staff.

### Gather position information

A *position* is an instance of a job that is filled by one employee, is located at one office or facility and has one supervisor. Each position represents a box on the organizational chart. A position may be open or closed. An *open position* is one for which the organization is currently seeking applicants. A *closed position* is one to which an employee is currently assigned.

Compile a complete list of all current positions, both open and closed. For all closed positions, you will also need to gather additional information about the employee filling the position.

For each position, gather the following required information:

- Job -- Each position is categorized under a generic job that has already been defined in the system.
- Position title -- This may be the same or different as the generic job title.
- Position code
- Actual or proposed salary, including the currency in which the salary is paid
- Facility or office where the position is located

In addition, gather as much of the following information about each position as possible (all of these fields are optional):

- Position description, if different from or in addition to the job description
- Salary sources
- Supervisor's position
- Department

- Position type
- Hiring date
- Proposed end date, if the position is a short-term or contract position

**Action:** Enter all positions into the system (see Add positions).

### Gather employee information

For each employee, gather the following required information:

- Full name (first name and surname)
- Nationality
- Country and district/state province of residence; county of residence is optional
- Position

In addition, gather as much of the following information about each employee as is available to you (all of these fields are optional):

- Date of birth
- Gender
- Marital status
- Number of dependents
- Identification types and numbers
- Personal contact information -- mailing address, telephone number(s), fax number, email address
- Work contact information -- mailing address, telephone number(s), fax number, email address
- Emergency contact information -- mailing address, telephone number(s), fax number, email address, notes such as emergency contact name and relationship
- Other contact information -- mailing address, telephone number(s), fax number, email address that do not fit into any of the other contact categories
- Benefit information -- benefit type, source, currency, amount, start date, end date and recurrence frequency

iHRIS Manage also supports storing the following information about each employee (you may or may not choose to enter this information during the initial data entry process):

- Educational history -- institutions attended, graduation dates, education types and degrees, and majors
- Employment history -- previous company names, addresses, telephone numbers, supervisors, reasons for leaving, starting positions, dates and salaries, ending positions, dates and salaries, and job responsibilities
- Qualifications -- languages and competencies in which the employee is proficient

**Action:** Enter all employees in the system (see Manage People).

## Set Up a Training Program

The in-service training management module is an optional module that can be used to manage in-service training courses offered to employees. Using this module, you can schedule employees to take courses, evaluate employee performance in training courses and assess competencies earned from training. If you choose to use this module, you should gather data about training courses offered to employees to enter in the system. The training program data may be entered by a Training Manager or HR Manager. After initially setting up the training program, you may update training course information or add new courses at any time.

Before you can use this module, you must enable it in the system (see Enable the In-Service Training Management Module).

## Training Course Descriptions

There are various ways you can categorize a training course in the training program management module. You can set up course categories. You can assign a status to a course, such as open, closed or full. You will select these descriptors when you enter a training course's details.

You can also select the requestor who asked that an employee be scheduled for a course, such as the employee, their supervisor, human resources, a manager or a donor. Finally, you can set up options for evaluations of an employee's performance in a training course, such as Pass, Fail or Incomplete. You will select these descriptors when scheduling a training course for an employee.

**Action:** Determine which of these descriptions you want to use and what the standards should be for your organization. Enter each into the system (see Set up the In-Service Training Management Module.)

## Training Institutions

If you like, you can record information about institutions that offer training courses in the system. For each training institution, you can record the name, its geographical location, and its mailing address, telephone numbers, fax number, email address and primary contact person. You can then select the training institution giving each course when you enter the training course's details.

**Action:** Enter all training institutions into the system (see Add a training institution).

## Training Funders

You can also record information about the organization or donor that is funding a training course. For each training funder, you can record the name, its geographical location, and its mailing address, telephone numbers, fax number, email address and primary contact person. You can then select the training institution giving each course when you enter the training course's details.

**Action:** Enter all training funders into the system (see Add a training funder).

## Continuing Education Courses

*Continuing education courses* are courses that provide official continuing education units (CEUs) to an employee, in order to renew a license, for instance. Continuing education courses may be associated with training courses if an employee can earn CEUs by taking the course. A training course may include one or more continuing education courses. You can enter the name and the number of credit hours (CEUs) earned in each continuing education course. You can then associate the continuing education course with its training course when adding the training course details.

**Action:** Enter all continuing education courses into the system (see Add a continuing education course).

## Training Courses

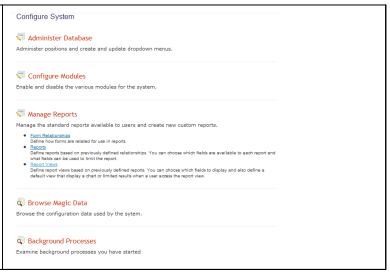
For each in-service training course, collect the Name of the course, its topic and the schedule of classes offered, including the maximum number of students and site for each course. You may also record the course category, the training institution offering the course, the training funders funding the course, CEUs (continuing education units) and competencies provided by the course, the names of the instructors, and the geographical location where each class is being given.

**Action:** Enter all training courses and their schedules into the system (see Add a training course and Schedule a course).

# System Administration

# iHRIS:Administer the System

## Configure System

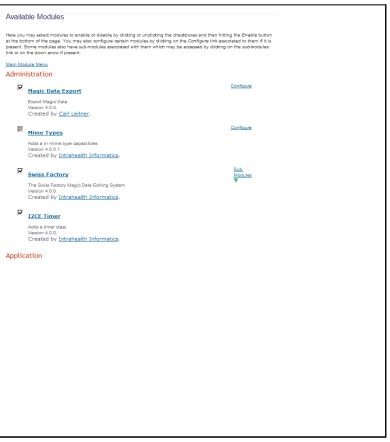
| | |
|---|---|
| Click Configure System on the main menu to access options for setting up and customizing iHRIS. Here is where you can administer the database (set up dropdown menus, configure modules that will be used in the system, export and import data, and create and update user accounts), manage reports, browse configuration data, examine background processes, control cached forms, and administer users. Only the System Administrator and the HR Manager can access the Configure System page. The Administrator can access all functions on this page, but the HR Manager can only access the Administer Database functions. |  |

The System Administrator manual (to be written) will contain extensive documentation for the following functions in the Configure System menu:

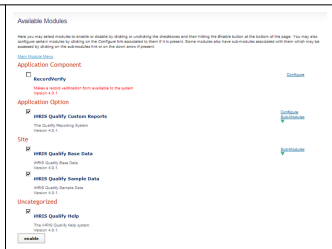
- Configure Modules
- Manage Reports
- Browse Magic Data
- Manage Locales
- Background Processes
- Cached Forms

See the section **Configure the Database for Use** under iHRIS Manage or iHRIS Qualify for help with administering the database. See Administer User Accounts for help with administering users. See The Customized Report Builder section for more information on managing reports.

## Configure Modules

| | |
|---|---|
| Click Configure Modules to enable new modules and customize all modules that have been installed for use in iHRIS. This page lists all modules that have been installed for the system, including those that were installed with the main software package and any modules you may have installed separately. Only the System Administrator can configure modules.<br>A checkbox appears beside most module names. If the checkbox is checked, the module is enabled, or turned on. Most modules are enabled by default. Click the checkbox to remove the check and disable the module, if it is not needed; you will then have to click the `Enable` button at the bottom of the page to save the change. The module can be re-enabled at any time by re-checking the box and clicking `Enable` again. Note that if the checkbox does not appear, the module is required for iHRIS to operate properly and cannot be disabled.<br>Beside most modules a Configure link appears. Click Configure to open a new screen showing all options for that module. These modules will change depending on the module that is selected. Use this page to customize settings for the module. |  |

## Disable the Record Verify Module

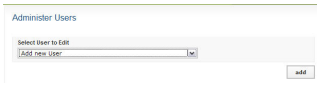
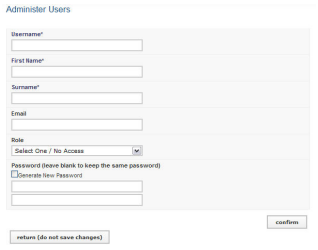
| | |
|---|---|
| **The Record Verify Module is currently available only in iHRIS Qualify.**<br>By default, the Record Verify Module is turned on when iHRIS Qualify is installed. This module is optional and is intended to be used if the data manager wants to track verifications and updates to health worker records. If this functionality is not needed, it may be disabled to simplify the interface.<br>The System Administrator can disable this module in the Configure Modules page. To turn off the module, follow these steps:<br>1. Click Configure Modules.<br>2. Scroll down to the "Application" section and locate iHRIS Qualify.<br>3. Click Sub-Modules to the right of iHRIS Qualify.<br>4. Under the "Application Component" section, click the checkbox next to **RecordVerify**.<br>5. Scroll to the bottom of the page and click the `Enable` button. The module will be disabled, and record verification functions will no longer be available in the system (see Add a Verification for details). |  |

# iHRIS:Administer Users

Click Administer Users to create, update and disable user accounts to enforce secure access to the system. Only the System Administrator can add and update user accounts.

## Add a User

In order to allow a user to access the system, the System Administrator must create a user account for the person, with a unique username and password. Each user is assigned a role, which determines the actions that the user can perform in the system.

| | |
|---|---|
| On the Home page or left menu, click Configure System. Click Administer Users.<br>Select Add New User from the dropdown menu and click the `Add` button. |  |
| The Administer Users form opens. Enter a **Username** for the user: one word with no special characters (letters and numbers only).<br>Enter the **First Name** and **Surname** of the user.<br>Enter an **Email** for the user, if known (optional).<br>Select the **Role** of the user (see below for roles). If no role is selected, the user will be disabled and cannot access the system in any capacity.<br>Select the option to randomly **Generate New Password** or enter a **Password** for the user. If the password is entered, re-enter it to confirm. The two passwords must match.<br>Click `Confirm` and confirm that the account entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

If an email address was entered, an email message will be sent to the user with the username and password. Otherwise, you will have to provide the user with the username and password.

### iHRIS Qualify User Roles

- **Administrator:** has full access to the system
- **Data Operations Manager:** manages system data, including correcting data and managing data selection lists; can search for, view, enter data in and correct any record and generate any report
- **Decision Maker:** generates reports in order to analyze data; can search for and view any record but cannot enter data into the system
- **Records Officer:** enters general information about health workers, including demographic, education, identification, contact, training, deployment and out migration information, as well as notes
- **Registration Supervisor:** enters all general information about health workers, plus issues registrations, licenses and private practice licenses, and enters continuing education information and disciplinary notices

### iHRIS Manage User Roles

- **Administrator:** has full access to the system
- **Executive Manager:** generates reports in order to analyze data; can search for and view any record but cannot enter data into the system
- **HR Manager:** manages system data, including correcting data and managing data selection lists; can search for, view, enter data in and correct any record and generate any report
- **HR Staff:** enters and updates records and positions; can generate any report
- **Training Manager:** sets up the in-service training management program, schedules employees for trainings and evaluates employees performance in trainings

### Troubleshooting

**A required field was not completed.**

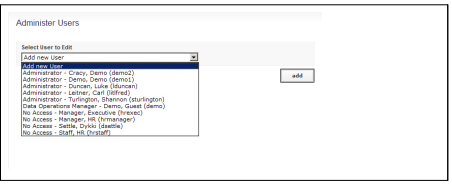
The system will display an error message. The required field(s) will be outlined in red. Complete the missing fields and try saving again. If you do not want to add the user account after all, click `Return (do not save changes).`

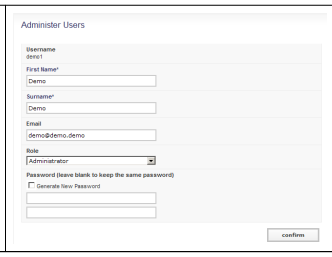
**The username is already in the system.**

The system will generate an error for duplicate usernames. Return to the Administer Users screen and select the username from the dropdown menu to edit the user account (see Update a User).

## Update a User

If information about a user has changed, the System Administrator can update the user account with the change. Usernames and passwords may also be changed. If a user no longer has access to the system, the account can be disabled.

| | |
|---|---|
| On the Home page or left menu, click Configure System. Click Administer Users.<br>From the menu select the user account to change. |  |

| | |
|---|---|
| The user account information is displayed. Make the change or select "No Access" from the **Role** menu to disable the account.<br>Click `Confirm` and confirm that the changes entered are correct. If they are not correct, click `Edit` to change them. If they are, click `Save` to save them. |  |

### Troubleshooting

**A required field was not completed.**

The system will display an error message. The required field(s) will be outlined in red. Complete the missing fields and try saving again. If you do not want to update the user account after all, click `Return (do not save changes).`

# iHRIS:Create Reports

Reports enable analysis of health worker data in various ways. The options for building custom reports are located on the Configure System page under "Manage Reports." Click View Reports on the home page or left side menu to run, print and export standard or customized reports of health workers and offices/facilities, statistical charts and other pre-configured reports. Administrators can define report relationships, reports and report views for other users to access; Managers can also create new report views.

## Report Relationships

The Administrator can define a relationship between system forms on which to base reports, or can edit or delete an existing report relationship. Defining report relationships requires extensive knowledge of the database and forms used in iHRIS and is restricted to Administrators. Unless you understand report relationships, you should not edit or delete the existing report relationships pre-defined in iHRIS. These report relationships are used to create the standard reports that are available once iHRIS is installed.

To edit the pre-defined report relationships and define new relationships, click Form Relationships under "Manage Reports" on the Configure System screen.

Learn more about form and field relationships, and view a graphical representation, for iHRIS Qualify (see iHRIS Qualify Form and Fields 4.0) and for iHRIS Manage (see iHRIS Manage Form and Fields 4.0).

## Reports

The Administrator or Manager can define a new report, or can edit or delete an existing report. Creating reports requires some knowledge of the data fields used in iHRIS. Unless you understand these fields, you should not edit or delete the existing reports pre-defined in iHRIS. These reports are used to create the standard report views that are available once iHRIS is installed.

To edit the pre-defined reports and create new reports, click Reports under "Manage Reports" on the Configure Systems screen. Reports are generated automatically every 10 minutes. The time the report was last generated is shown beneath the report name. If you need to manually generate a report--to immediately show a change to the database, for example--do so by clicking Generate. If for some reason the report generation fails, click Generate (Forced) to correct it.

Reports can be exported to an XML format file by clicking Save All Reports in the middle of the page, under the "Staff Reports" section.

## Report Views

Report views define how data are displayed in a report. Multiple report views can be created for the same report so that data may be aggregated and analyzed in various ways. For each report, data can be displayed either as a table or as a chart. The data may also be exported for further analysis, or the report may be printed.

Administrators and Managers can create new report views or edit views that have already been defined. At least one report view must be defined before a report can be run. Other users may run any report view, but they cannot create new views. Creating report views requires some knowledge of the data fields used in iHRIS. Unless you understand these fields, you should not edit or delete the existing report views pre-defined in iHRIS.

To edit the pre-defined report views and create new report views, click Report Views under "Manage Reports" on the Configure Systems screen. All users may access the defined reports by clicking View Reports on the home page or left navigation screen.

## Pre-defined Report Views in iHRIS Qualify

The following pre-defined report views are available once iHRIS Qualify is installed.

**Training Reports**

**Exam Pass/Fail:** A pass/fail comparison for all exams.

**Exam Pass/Fail by Year:** A pass/fail comparison for all exams by year.

**Licensed Health Workers by Cadre:** A chart of all licensed health workers by cadre.

**Licensed Health Workers:** A list of all licensed health workers.

**Registered Health Worker:** A list of all registered health workers.

**Search Training:** Search based on training information.

**Discontinuations by Category:** A pie chart of all discontinuation categories.

**Discontinuations by Reason:** A chart of all discontinuations by reason.

**Discontinuations by Year:** A chart of all discontinuations by year.

**Resumption Report:** A pie chart of disruptions that have been resumed or not.

**Training Institutions**

**Training Institutions:** A list of all training institutions.

**Person Reports**

**Registration Results by First Training:** The registration results for each person's first training.

**Pass/Fail by First Training:** The pass/fail results for each person's first training.

**Student Intake Year:** The number of students entering training by year.

**Students in Training by Year:** Students by intake year that are broken down by in or not in training.

**Top Birth District:** A pie chart of the top districts entering training.

**Search Reports**

**Search People:** Search people in the system.

## Pre-defined Report Views in iHRIS Manage

The following pre-defined report views are available once iHRIS Manage is installed.

**Facility Report**

**Facility List:** A list of all facilities.

**Position Reports**

**Position List:** A list of all positions.

**Position Open Duration:** The length in days each position was open before being filled.

**Search**

**Search People:** Search all person records in the system.

**Staff Reports**

**Age Distribution:** Total of all staff by age range.

**Classification Breakdown:** A total of all staff by classification.

**Hires per Year:** Hire totals by year.

**Job Breakdown:** Total staff by job.

**Nationality Breakdown:** A list of all staff by nationality.

**Retirement Planning:** Staff totals by retirement year.

**Emergency Contact List:** A list of all staff with emergency contact details.

**Home Contact List:** All staff with home contact details.

**Salary List:** A list of all employees with salary details.

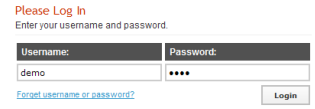
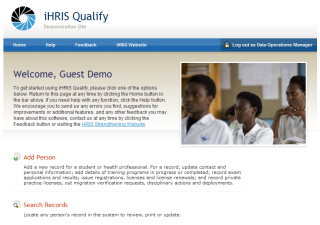
**Staff Directory:** A list of all current staff with work contact information.

# Accessing the System

# iHRIS:User Access

## Log in

Before performing any task in iHRIS Qualify, you need to log in. You cannot log in unless a user account has been created for you and you have been given a username and password. If you do not have a user account, contact your System Administrator.

| | |
|---|---|
| Connect to the system. The Welcome page appears. In the Log In form, enter the **Username** and **Password** that were provided to you. Click the `Login` button. |  |
| The Home page opens listing the actions that you can perform based on your role. |  |

### Troubleshooting

**The password is not correct.**

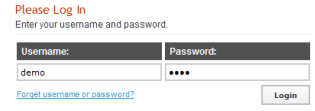
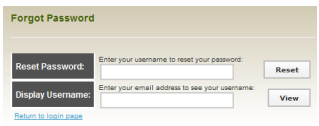
You will be prompted to re-enter the password. If you cannot remember your password, you can generate a new password (see Retrieve a forgotten password or username).

**The username is not correct.**

You will get an error message. If you cannot remember your username, you can retrieve it (see Retrieve a forgotten password or username).

## Retrieve a Forgotten Password or Username

If you have forgotten your password or username, you can generate a new one.

| | |
|---|---|
| From the Log In page, click Forget username or password? |  |
| The Forgot Password page opens.<br>To reset the password, enter your **Username** in the box next to "Reset Password" and click the `Reset` button. The system will email your new password to you.<br>To recover your username, enter your **Email Address** in the box next to "Display Username" and click the `View` button. The system will display your username.<br>Click the link to Return to login page and log in as normal. |  |

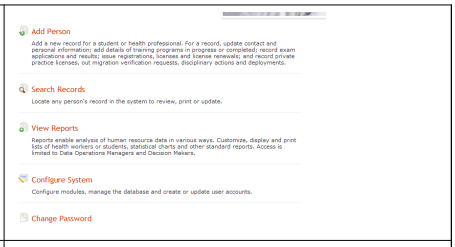
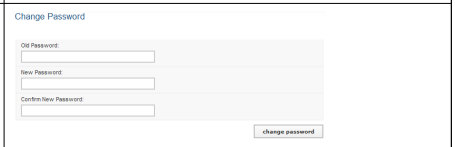
### Troubleshooting

**The system does not recognize the email address.**

Contact your System Administrator for help.

## Change Your Password

At any time, you can change your password for logging into the system.

| | |
|---|---|
| Log in. Click Change Password in the main menu or left navigation menu. |  |
| The Change Password form opens.<br>Enter your **Old Password** (current password).<br>Enter the desired **New Password**.<br>Re-enter the password under **Confirm New Password** to confirm it.<br>Click `Change Password` to save the new password. |  |

### Troubleshooting

**An error message appears when Confirm is clicked.**

Re-enter the password twice. The two passwords must match or the system won't accept the new password.

## Log Out

When you are finished working in the system, log out to prevent any unauthorized person from accessing the system.

| | |
|---|---|
| In the upper left corner on any page, click Log out (next to the padlock).<br>The Welcome page appears. You will have to re-enter your username and password to regain access to the system. |  |

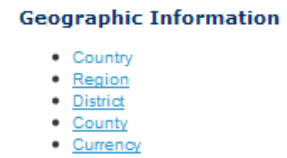
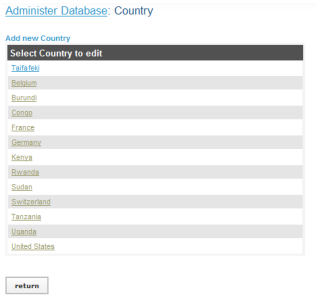
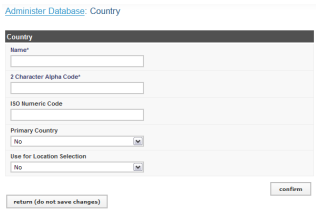
# Managing the Database

# iHRIS:Add Geographical Areas

To ensure that standard data types such as cadres, marital status, geographical locations and the like are enforced across the system, those standard data types must be created as lists. These lists are used to create selection menus that provide standard options for selection when adding records, jobs and positions. Click Administer Database to create and update standards lists of data for selection in system menus. Only the Data Operations Manager and System Administrator can create data types.

## Add a Country

You will need to add at least one country to the system for selection whenever a geographical location is required. This should be the country where your organization's headquarters are located. In addition, you should add the names of all countries where employees are located or all nationalities you would like to track in the system.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Geographic Information" section, select Country. |  |
| The Country page opens, showing all the countries entered in the database. Click Add New Country. (To edit an existing country, click its name and then click Update This Information.) |  |
| The Country form opens. Enter or edit the **Name** of the country.<br>Enter the **2 Character Alpha Code** for the country.<br>Enter the **ISO Numeric Code** for the country (optional).<br>If the country is the primary country where your organization is located, select Yes in the **Primary Country** menu. This will place the country name at the top of all country selection menus. Otherwise, leave the default as No. There can be multiple primary countries.<br>If the country is to be used for locations, such as addresses, select Yes in the **Use for Location Selection** menu. Selecting No will not display the country in any location selection menus, only for nationality selection.<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

### Troubleshooting

**An error message appears when the Confirm button is clicked.**

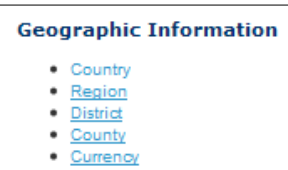
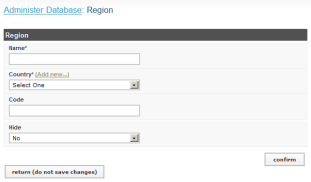
Make sure that the country and two-letter country code have not previously been entered into the system. The system will not allow duplicate countries. Also check that the country name and code have been entered -- these fields are required. Required fields will be outlined in red. Try completing the missing fields or changing the country name and saving again. If you do not want to add the country after all, click `Return (do not save changes).`

**The required 2-Character Alpha Code is not known.**

Find a complete list of 2-letter country codes on the International Organization for Standardization (ISO) website [1].

## Add a Region

A *region* is a major subdivision of a country. Region choices depend on which country is selected; only a region that is associated with a particular country can be chosen when that country is selected. For each country you have entered in the system, add at least one region.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Geographic Information" section, select Region. |  |
| The Region page opens. Click Add New Region. (To edit an existing region, select its country from the menu and click the `View` button; then click the region's name and click Update This Information.) | |
| The Region form opens. Enter or edit the **Name** of the region.<br>Type the name of or select the **Country** in which the region is located.<br>Enter a **Code** for the region (optional).<br>If necessary, choose to **Hide** the region, for an old region that is no longer valid and therefore should no longer be an option.<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

### Troubleshooting

**An error message appears when the Confirm button is clicked.**

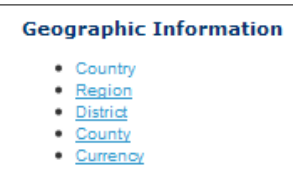
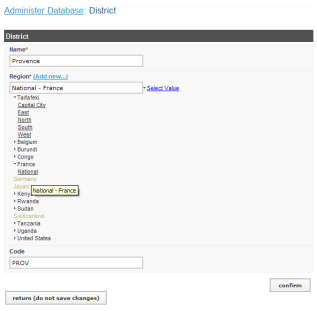
Check that a region with the same name has not already been entered for that country. There cannot be two regions with the same name in the same country. Also make sure that the region name was entered and its country was selected -- these fields are required. Required fields are outlined in red. Fill in the missing information and try saving again. If you do not want to add the region after all, click `Return (do not save changes).`

**The country name is not available for selection.**

Next to "Country", click Add New and add the country. Then click Administer Database and follow the steps above to add the new region. You will have to re-enter any information that you previously entered for the region.

## Add a District

A *district* is a subdivision of a region. In some locations, the district may be called the *state* or *province*. District choices depend on which country is selected; only a district that is associated with a particular country can be chosen when the country is selected. For each region you have entered in the system, add at least one district.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Geographic Information" section, select District. |  |
| The District page opens. Click Add New District. (To edit an existing district, type or select the region where it is located and click the `View` button; then click the district's name and click Update This Information.) | |
| The District form opens. Enter or edit the **Name** of the district. | |
| Type the name of the **Region** or select the **Country** and then the **Region** in which the district is located.<br>Enter a **Code** for the district (optional).<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

### Troubleshooting

**An error message appears when the Confirm button is clicked.**

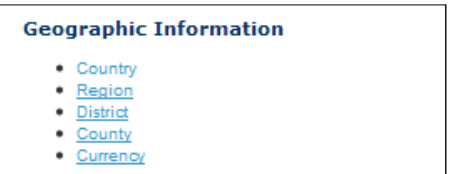
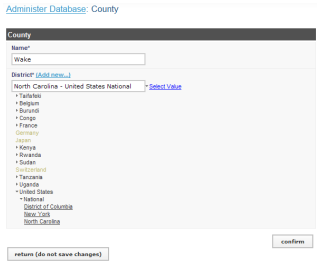
Check that a district with the same name has not already been entered for that region. There cannot be two districts with the same name in the same region. Also make sure that the district name has been entered and the country and region for the district were selected -- these fields are required. Required fields are outlined in red. Fill in the missing fields and try saving again. If you do not want to add the district after all, click `Return (do not save changes)`.

**The region name is not available for selection.**

Beside **Region**, click Add New and add region. Then click Administer Database and follow the steps above to add the new district. You will have to re-enter any information that you previously entered for the district.

# Add a County

A *county* is a smaller geographical division within a district. The term *county* corresponds to *sector* in some locations. Assigning counties is optional for this system. County choices depend on which district is selected; only a county that is associated with a particular district can be chosen after that district is selected. For any district entered in the system, you may add multiple counties.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Geographic Information" section, select County. |  |
| The County page opens. Click Add New County. (To edit an existing county, type or select the district where it is located and click the `View` button; then click the county's name and click Update This Information.)<br>Enter or edit the **Name** of the county. | |
| The County form opens. Type the name of the **District** or select the **Country**, the **Region** and the **District** in which the county is located.<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

## Troubleshooting

**An error message appears when the Confirm button is clicked.**

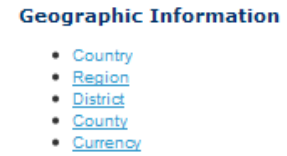
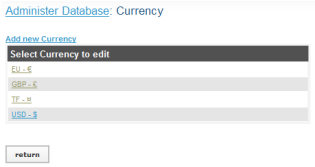
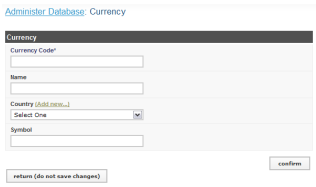
Check that a county with the same name has not already been entered for that district. There cannot be two counties with the same name in the same district. Also check that the county name has been entered and the country, region and district have been selected -- these fields are required. Required fields will be outlined in red. Try completing the missing fields and saving again. If you do not want to add the county after all, click `Return (do not save changes)`.

**The correct district is not available for selection.**

Click Add New beside **District** and add the new district. Then click Administer Database and follow the steps above to add the new county. You will have to re-enter any information you previously entered for the county.

# Add a Currency

If your organization pays salaries or other payments in more than one currency, you should add each currency. The correct currency may then be selected when entering the salary or special payment. At least one currency should be added.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Geographic Information" section, select Currency. |  |
| The Currency page opens, showing all currencies entered in the database. Click Add New Currency. (To edit an existing currency, click its name; then click Update This Information.) |  |
| The Currency form opens. Enter the **Currency Code**, an abbreviation that will identify the currency in selection menus.<br>Enter the **Name** of the currency (optional).<br>Select the **Country** for the currency (optional).<br>Enter the **Symbol** for the currency; the symbol will also appear in selection menus (optional).<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

## Troubleshooting

**An error message appears when Confirm is clicked.**

Make sure the currency code was entered and that it is not the same as a code that has already been entered. Change the code and try saving again. If you do not want to add the currency after all, click `Return (do not save changes)`.

**The currency code is not known.**

Find a list of all standard currency codes at the International Organization for Standards (ISO) website [2].

**The country for the new currency is not available for selection.**

Click Add New next to **Country** and add the country name. Then click Administer Database and follow the steps above to add the new currency. You will need to re-enter any information you previously entered for the currency.

**How do I enter a currency symbol that does not appear on my keyboard?**

If you are using a Windows computer and have a separate numeric keypad on your keyboard, you may enter a currency symbol by holding down the ALT key and typing in the code for the symbol on the numeric keypad, then releasing the ALT key.

- British pound: ALT+0163
- Euro: ALT+0128
- Yen: ALT+0165
- Generic currency symbol: ALT+0164

The symbol is optional and may be omitted.

# References

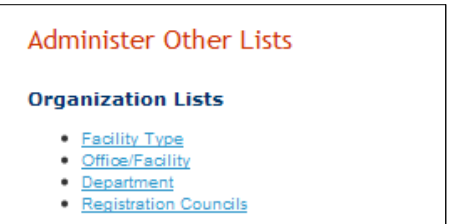
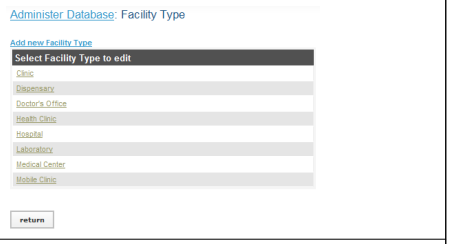
[1] http://www.iso.org/iso/en/prods-services/iso3166ma/02iso-3166-code-lists/list-en1.html
[2] http://www.iso.org/iso/support/faqs/faqs_widely_used_standards/widely_used_standards_other/currency_codes/currency_codes_list-1.htm

# iHRIS:Administer Database for iHRIS Manage

To ensure that standard data types such as marital status, reasons for position changes, facility and department names, and the like are enforced across the system, those standard data types must be created as lists. These lists are used to create selection menus that provide options for selection when adding records, jobs and positions. Click Configure System and then click Administer Database to create and update standard lists of data for selection in system menus. Only the HR Manager and System Administrator can create data types.

## Add a Facility Type

The *facility type* classifies each office and facility in the organization for reporting and organizational purposes. Examples of facility types include Office, Hospital and Clinic. Specify at least one facility type.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Organization Lists" section, select Facility Type. |  |
| The Facility Type page opens, showing all the Facility Types entered in the database. Either click Add New Facility Type or select an existing facility type and then click Update This Information to edit it. |  |
| The Facility Type form opens. Enter the **Name** of the facility type. Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. | |

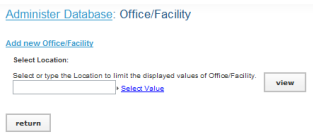
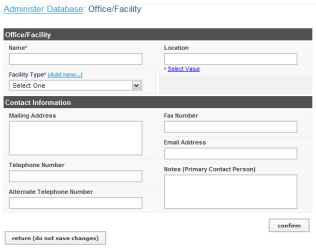
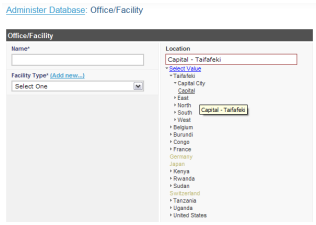
### Troubleshooting

**An error message appears when Confirm is clicked.**

Make certain you have entered a name for the facility type and that it is not the same as a facility type that was already entered. Change the name and try saving again. If you do not want to create the facility type after all, click `Return (do not save changes).`

## Add an Office or Facility

If your organization has multiple offices or facilities, you may add each one to the system in order to link positions to the offices or facilities where they are located. You may also update information about an office or facility if it changes. Enter at least one office or facility, preferably the location of your organization's headquarters.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Organization Lists" section, select Office/Facility. | |
| The Office/Facility page opens.<br>Click Add New Office/Facility. (To edit an existing office or facility, first select or type the country, region and district where the facility is located; then click its name and click Update This Information to edit it. |  |
| The Office/Facility form opens<br>Enter the **Name** of the office or facility.<br>Select a **Facility Type** for the office or facility.<br>Enter the **Contact Information** for the office or facility (optional). |  |
| Under **Location**, either type the name of the district where the office or facility is located, or click Select Value and select the Country, Region and District where the office or facility is located.<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

## Troubleshooting

**An error message appears when the Confirm button is clicked.**

Make sure that all required fields have been completed and that the name of the office or facility has not already been entered. Required fields are outlined in red. Fill in any missing information and try saving again. If you do not want to add the office or facility after all, click `Return (do not save changes).`

**The correct facility type is not available for selection.**

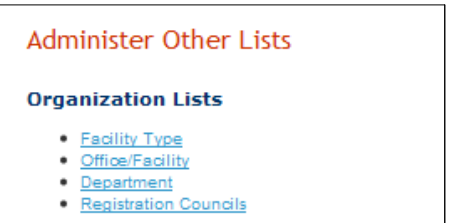
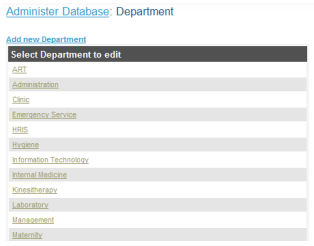
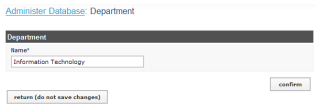
Click Add New beside the "Facility Type" menu and enter the name of the facility type. Then click Administer Database and follow the steps above to add the new office or facility. You will have to re-enter any information you previously entered for the office or facility.

**The correct country, district or county is not available for selection.**

The geographical location needs to be added to the database (see Add geographical areas).

# Add a Department

If any part of your organization is structured into departments, you may add them to the system and then link positions to their departments. Examples of departments include Finance, Information Technology and Human Resources. If your organization does not use departments, you may skip this step.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Organization Lists" section, select Department. |  |
| The Department page opens, showing all departments entered in the database. Either click Add New Department or select an existing department and click Update This Information to edit it. |  |
| The Department form opens. Enter the **Name** of the department. Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

## Troubleshooting

**An error appears when Confirm is clicked.**

Make sure that you have entered a name for the department and that it is not the same as a department that was already entered. Change the name and try saving again. If you do not want to add the department after all, click `Return (do not save changes).`

# Add a Registration Council

A *registration council* is the professional association or licensing board that registers health professionals, such as nurses or midwives. If your organization needs to track these registrations or licenses for your employees, enter the name of at least one registration council for selection.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Organization Lists" section, select Registration Councils. | |
| The Registration Council page opens, showing all Registration Councils entered in the database. Either click Add New Council or select an existing registration council's name and click Update This Information to edit it. | |
| The Registration Council form opens. Enter the **Name** of the registration council. Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. | |

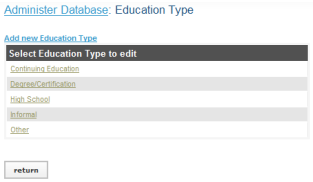
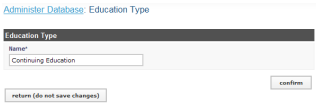
### Troubleshooting

**An error message appears when Confirm is clicked.**

Make certain you have entered a name for the registration council and that it is not the same as a registration council that was already entered. Change the name and try saving again. If you do not want to create the registration council after all, click `Return (do not save changes).`

## Add an Education Type

The *education type* classifies a type of educational institution that issues degrees. Education types are selected when entering a person's educational history. Examples of education types include High School, College and University.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Employee Lists" section, select Education Type. | |
| The Education Type page opens, showing all Education Types entered in the database. Either click Add New Education Type or select an existing education type and click Update This Information to edit it. |  |
| The Education Type form opens. Enter the **Name** of the education type. Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

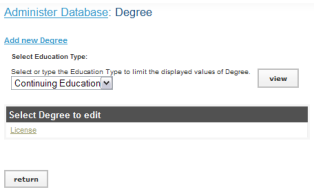
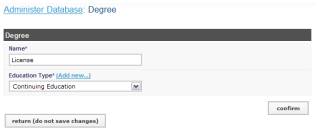
### Troubleshooting

**An error message appears when Confirm is clicked.**

Make certain that the education type has not already been entered. Change the name and try saving again. If you do not want to add the education type after all, click `Return (do not save changes).`

## Add a Degree

After adding an education type, you will need to add one or more kinds of degrees for that type. The degree will be selected when entering the educational history for a person into the system. Examples of degrees include: diploma for high school; Bachelor's degree for college; and Master's degree or PhD for university.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Employee Lists" section, select Degree. | |
| The Degree page opens. Either click Add New Degree or to edit an existing degree, select its education type and click the `View` button to display all matching degrees; then click the degree name and click Update This Information to edit it. |  |
| The Degree form opens.<br>Enter a **Name** for the degree.<br>Select the **Education Type** for the degree.<br>Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

### Troubleshooting

**An error message appears after clicking Confirm.**

Make sure that the name of the degree has been entered and an education type has been selected -- these fields are required. The required fields will be outlined in red. Also make certain that the degree has not already been entered for that education type; duplicates are not allowed. Complete the missing or incorrect fields and try saving again. If you do not want to add the degree after all, click `Return (do not save changes)`.

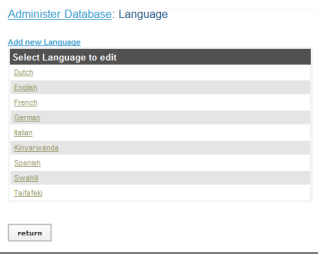
**The matching education type does not appear in the list.**

Click Add New beside the "Education Type" menu to add a new education type. Then click Administer Database and follow the steps above to add the new degree. You will have to re-enter any information you previously entered for the degree.

## Add a Language

If you want to track employee proficiency in speaking, reading and writing foreign languages, each language must be added to the system to be selected when adding the employee's qualifications.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Employee Lists" section, select Language. | |

| | |
|---|---|
| The Language page opens, showing all languages entered in the database. Either click Add New Language or select an existing language and click Update This Information to edit it. |  |
| The Language page opens. Enter the **Name** of the language. Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. | |

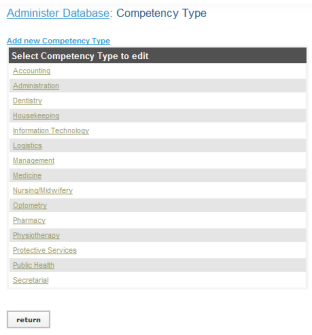
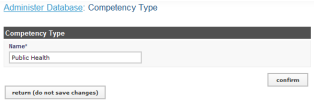
### Troubleshooting

**An error message appears when Confirm is clicked.**

Make certain that the language has not already been entered. Change the name and try saving again. If you do not want to add the language after all, click `Return (do not save changes)`.

## Add a Competency Type

A *competency type* is a broad category for organizing competencies, or skills in which employees have been assessed as competent. Examples of competency types include Computer Skills, Client Interaction and Diagnostics. Competency types combined with competencies comprise your organization's competency model.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Employee Lists" section, select Competency Type. | |
| The Competency Type page opens, showing all the Competency Types entered in the database. Either click Add New Competency Type or select an existing competency type and click Update This Information to edit it. |  |
| The Competency Type form opens. Enter the **Name** of the competency type. Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

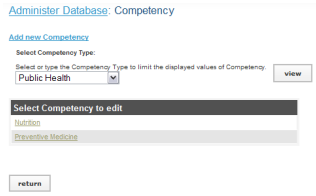
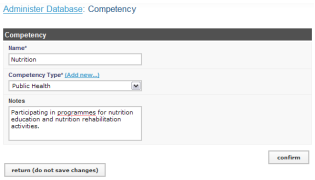
### Troubleshooting

**An error message appears when Confirm is clicked.**

Make certain that the competency type has not already been entered. Change the name and try saving again. If you do not want to add the competency type after all, click `Return (do not save changes).`

## Add a Competency

After adding a competency type, add one or more *competencies*--skills or qualifications in which an employee has been assessed as competent--grouped under that competency type. For example, for the competency type Computer Skills, specific competencies could include Data Entry, Software Use and Document Formatting. The set of competencies and competency types comprise your organization's competency model. When an employee has been assessed as having a particular competency, that competency can be added to the employee's record. Competencies may also be earned by completing training courses.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Employee Lists" section, select Competency. | |
| The Competency page opens. Either click Add New Competency or to edit an existing competency, select its competency type and click the `View` button to display all matching competencies; then click the competency name and click Update This Information to edit it. |  |
| The Competency form opens.<br>Enter a **Name** for the competency.<br>Select the **Competency Type** for the competency.<br>Enter any **Notes** about the competency (optional).<br>Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

### Troubleshooting

**An error message appears when Confirm is clicked.**

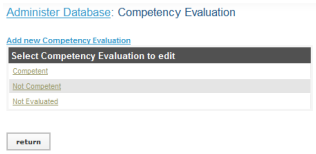
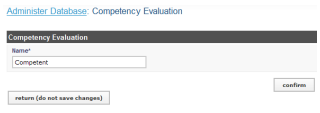
Make sure that a competency was not already entered for that competency type. Change the name or competency type and try saving again. If you do not want to add the competency after all, click `Return (do not save changes).`

**The correct competency type is not available for selection.**

Beside the "Competency Type" menu, click Add New and enter the correct competency type. Then click Administer Database and follow the steps above to add the new competency. You will have to re-enter any information you previously entered for the competency.

## Add a Competency Evaluation

If you want to assess an employee in a particular competency, each evaluation option must be added for selection when making the assessment. For example, you might enter "Competent," "Not Competent" and "Not Assessed" as options to select for the evaluation.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Employee Lists" section, select Competency Evaluation. | |
| The Competency Evaluation page opens, showing all the Competency Evaluations entered in the database. Either click Add New Competency Evaluation or select an existing competency evaluation and click Update This Information to edit it. |  |
| The Competency Evaluation form opens. Enter the **Name** of the competency evaluation. Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

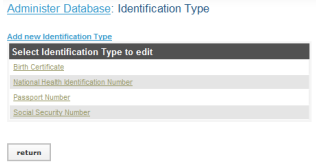
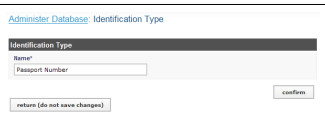
### Troubleshooting

**An error message appears when Confirm is clicked.**

Make certain that the competency evaluation has not already been entered. Change the name and try saving again. If you do not want to add the evaluation option after all, click `Return (do not save changes).`

## Add an Identification Type

The *identification type* classifies a type of identification, or non-changing information, used to identify an employee or applicant. Examples of identification types include Passport, Social Security Number and National Health Insurance Card.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Employee Lists" section, select Identification Type. | |
| The Identification Type page opens, showing all the Identification Types entered in the database. Either click Add New Identification Type or select an existing identification type and click Update This Information to edit it. |  |
| The Identification Type form opens. Enter the **Name** of the identification type. Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

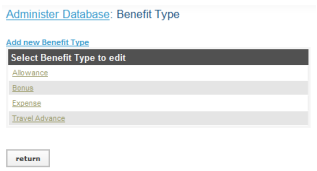
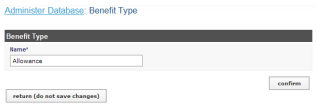
### Troubleshooting

**An error message appears when Confirm is clicked.**

Make sure that the identification type has not already been entered. Change the name and try saving again. If you do not want to add the identification type after all, click `Return (do not save changes).`

## Add a Benefit Type

The *benefit type* classifies a type of benefit or special payment to an employee. Examples of benefit types include Allowance, Travel Advance and Bonus.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Employee Lists" section, select Benefit Type. | |
| The Benefit Type page opens, showing all the Benefit Types entered in the database. Either click Add New Benefit Type or select an existing benefit type and click Update This Information to edit it. |  |
| The Benefit Type form opens. Enter the **Name** of the benefit type. Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

### Troubleshooting

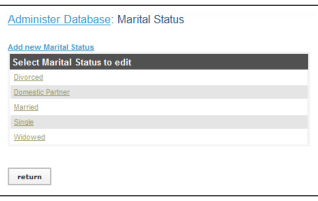
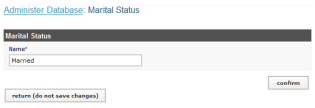
**An error message appears when Confirm is clicked.**

Make sure that the benefit type has not already been entered. Change the name and try saving again. If you do not want to add the benefit type after all, click `Return (do not save changes).`

## Add a Marital Status

*Marital status* is used to identify employees' legal status. Examples of marital status include Single, Married, Divorced and Widowed.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Employee Lists" section, select Marital Status. | |

| | |
|---|---|
| The Marital Status page opens, showing all the Marital Status items entered in the database. Either click Add New Marital Status or select an existing marital status and click Update This Information to edit it. |  |
| The Marital Status form opens. Enter the **Name** of the marital status. Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

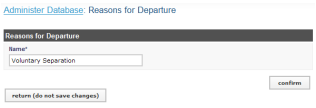
### Troubleshooting

**An error message appears when Confirm is clicked.**

Make certain that the marital status has not already been entered. Change the name and try saving again. If you do not want to add the marital status after all, click `Return (do not save changes).`

## Add a Reason for Departure

*Reasons for departure* are used to classify the reasons why an employee has left the employment of the organization or changed positions. Examples of reasons for departure include Promotion, Termination, Layoff, Illness, Death and Out Migration.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>In the "Employee Lists" section, select Reasons for Departure. | |
| The Reason for Departure page opens, showing all the reasons for departure entered in the database. Either click Add New Reasons for Departure or select an existing reason for departure and click Update This Information to edit it. | |
| The Reason for Departure form opens. Enter the **Name** of the reason for departure. Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

### Troubleshooting

**An error message appears when Confirm is clicked.**

Make certain that the reason for departure has not already been entered. Change the name and try saving again. If you do not want to add the reason for departure after all, click `Return (do not save changes).`

# iHRIS:In-service Training Management Module

**Please Note:** The In-Service Training Management Module has not yet been updated for iHRIS Manage Version 4.0. It has been disabled by default in the current release, but an update is scheduled for release soon. This documentation will also be updated when that release is available.

## Add a Training Course

A *training course* is a course that an employee may take to gain new competencies or continuing education credits. A training course covers only one topic, but it may have multiple classes that are available for employees to attend. Either the Training Manager or the HR Manager can add a training course.

1. From the home page or left menu, click Administer Database under Configure System.
2. In the "Training Course Information" section, select Training Courses.
3. Either select Add New Training Course and click the `Add` button, or select an existing training course to edit from the menu and click the `View` button, then click Update This Information.
4. Enter the **Name** of the training course.
5. Select the **Category** of the training course.
6. Enter the **Topic** of the course.
7. Select the name of the **Training Institution** giving the course.
8. Select any **CEUs** (continuing education units) earned by completing the course; hold down the CTRL key and click to select more than one.
9. Select the training course **Status**.
10. Enter any **Notes** about the course.
11. Select the names of the **Training Funders;** hold down the CTRL key and click to select more than one.
12. Select any **Competencies** gained by completing the course; hold down the CTRL key and click to select more than one.
13. Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it.

After saving the course information, the screen for entering the class schedule will appear (see Schedule a Course).

### Troubleshooting

**This option is not available.**

Make certain that the In-service Training Management Module has been enabled (see Enable the In-Service Training Management Module). Only the System Administrator can turn on the module.

**An error message appears when Confirm is clicked.**

Make certain that all required information has been entered. Fill in the required fields (outlined in red) and try saving again. If you do not want to add the training course after all, click `Return (do not save changes).`

**The category is not available for selection.**

First add the training course categories (see Add a Category of Training Course).

**The training institution is not available for selection.**

First add the training institutions (see Add a Training Institution).

**The correct CEUs are not available for selection.**

First add the continuing education courses (see Add a Continuing Education Course).

**The status is not available for selection.**

First add the training course status (see Add a Status of Training Course).

**The training funders are not available for selection.**

First add the training funders (see Add a Training Funder).

**The correct competencies are not available for selection.**

First add the competencies (see Add a Competency). Only the HR Manager can add competencies.

## Schedule a Course

After adding a training course, you need to schedule at least one class for that course. The class information includes the dates of the class and the location where the class is given. When an employee is scheduled to take a training course, that employee is assigned to one of these classes. A training course can have several classes.

1. From the home page or left menu, click Administer Database under Configure System.
2. In the "Training Course Information" section, select Training Courses.
3. From the dropdown menu, select the training course to schedule and click the `View` button.
4. Under "Scheduled Courses" click Schedule a Course.
5. Enter the **Maximum Number of Students** who can attend the class.
6. Select the **Start Date** and **End Date** for the class (today's date is entered for both by default).
7. Enter any **Notes** about the class.
8. Enter the class's **Site**, or the location where the class is taking place.
9. Enter the name(s) of the class's **Instructors**, if known.
10. Select the **Country**, **District** and **County** where the class is located (optional).
11. Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it.

### Troubleshooting

**This option is not available.**

Make certain that the In-service Training Management Module has been enabled (see Enable the In-Service Training Management Module). Only the System Administrator can turn on the module.

**An error message appears when Confirm is clicked.**

Make certain that all required information has been entered. Fill in the required fields (outlined in red) and try saving again. If you do not want to schedule the class after all, click `Return (do not save changes).`

**The country, district or county name is not available for selection.**

Under the "Geographical Location" menu, click Add New and add the country, district or county (only the HR Manager can do this). Then click Administer Database and follow the steps above to schedule the class. You will have to re-enter any information that you previously entered for the class.

# Add a Status of a Training Course

The training course *status* classifies whether the course is open, closed or any other status of your choosing. At least one status should be added.

1. From the home page or left menu, click Administer Database under Configure System.
2. In the "Training Course Information" section, select Status of a Training Course.
3. Either select Add New Training Course Status or select an existing status to edit.
4. Enter the **Name** of the status.
5. Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it.

## Troubleshooting

**This option is not available.**

Make certain that the In-service Training Management Module has been enabled (see Enable the In-Service Training Management Module). Only the System Administrator can turn on the module.

**An error message appears when Confirm is clicked.**

Make certain that the status has not already been entered. Change the name and try saving again. If you do not want to add the status after all, click `Return (do not save changes).`

# Add Requestors of a Training Course

The training course *requestors* are any person or group who requests that an employee attend a training course. Examples of requestors include the employee, the employee's supervisor, the human resources department or a donor organization.

1. From the home page or left menu, click Administer Database under Configure System.
2. In the "Training Course Information" section, select Requestors of a Training Course.
3. Either select Add New Training Requestor or select an existing requestor name to edit.
4. Enter the **Name** of the requestor.
5. Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it.

## Troubleshooting

**This option is not available.**

Make certain that the In-service Training Management Module has been enabled (see Enable the In-Service Training Management Module). Only the System Administrator can turn on the module.

**An error message appears when Confirm is clicked.**

Make certain that the requestor has not already been entered. Change the name and try saving again. If you do not want to add the requestor after all, click `Return (do not save changes).`

## Add an Evaluation of a Training Course

The training course *evaluation* is used to evaluate an employee's performance in a training course. Examples of evaluations include Pass, Fail and Incomplete. At least one evaluation option should be added.

1. From the home page or left menu, click Administer Database under Configure System.
2. In the "Training Course Information" section, select Evaluation of a Training Course.
3. Either select Add New Training Course Evaluation or select an existing evaluation option to edit.
4. Enter the **Name** of the evaluation option.
5. Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it.

### Troubleshooting

**This option is not available.**

Make certain that the In-service Training Management Module has been enabled (see Enable the In-Service Training Management Module). Only the System Administrator can turn on the module.

**An error message appears when Confirm is clicked.**

Make certain that the evaluation option has not already been entered. Change the name and try saving again. If you do not want to add the evaluation option after all, click `Return (do not save changes).`

## Add a Category of a Training Course

Training course *categories* group similar courses. The category is generally more broad than the training course topic. Using training course categories is optional.

1. From the home page or left menu, click Administer Database under Configure System.
2. In the "Training Course Information" section, select Category of a Training Course.
3. Either select Add New Training Course Category or select an existing category to edit.
4. Enter the **Name** of the category.
5. Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it.

### Troubleshooting

**This option is not available.**

Make certain that the In-service Training Management Module has been enabled (see Enable the In-Service Training Management Module). Only the System Administrator can turn on the module.

**An error message appears when Confirm is clicked.**

Make certain that the category has not already been entered. Change the name and try saving again. If you do not want to add the category after all, click `Return (do not save changes).`

# Add a Training Institution

*Training institutions* are organizations that give courses. Using training institutions is optional.

1. From the home page or left menu, click Administer Database under Configure System.
2. In the "Training Course Information" section, select Training Institution.
3. Either select Add New Training Institution and click the `Add` button, or select an existing training institution to edit from the menu and click the `View` button, then click Update This Information.
4. Enter the **Name** of the training institution.
5. Select the **Country**, **District** and **County** where the training institution is located.
6. Enter the **Contact Information** known for the training institution.
7. Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it.

## Troubleshooting

**This option is not available.**

Make certain that the In-service Training Management Module has been enabled (see Enable the In-Service Training Management Module). Only the System Administrator can turn on the module.

**An error message appears when Confirm is clicked.**

Make certain that all required fields have been completed. Fill in any missing fields (outlined in red) and try saving again. If you do not want to add the training institution after all, click `Return (do not save changes).`

**The country, district or county name is not available for selection.**

Under the "Geographical Location" menu, click Add New and add the country, district or county (only the HR Manager can do this). Then click Administer Database and follow the steps above to enter the training institution. You will have to re-enter any information that you previously entered for the training institution.

# Add a Training Funder

*Training funders* are organizations that fund employees to take training courses. Using training funders is optional.

1. From the home page or left menu, click Administer Database under Configure System.
2. In the "Training Course Information" section, select Training Funder.
3. Either select Add New Training Funder and click the `Add` button, or select an existing training funder to edit from the menu and click the `View` button, then click Update This Information.
4. Enter the **Name** of the training funder.
5. Select the **Country**, **District** and **County** where the training funder is located.
6. Enter the **Contact Information** known for the training funder.
7. Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it.

### Troubleshooting

**This option is not available.**

Make certain that the In-service Training Management Module has been enabled (see Enable the In-Service Training Management Module). Only the System Administrator can turn on the module.

**An error message appears when Confirm is clicked.**

Make certain that all required fields have been completed. Fill in any missing fields (outlined in red) and try saving again. If you do not want to add the training funder after all, click `Return (do not save changes).`

**The country, district or county name is not available for selection.**

Under the "Geographical Location" menu, click Add New and add the country, district or county (only the HR Manager can do this). Then click Administer Database and follow the steps above to enter the training funder. You will have to re-enter any information that you previously entered for the training funder.

## Add a Continuing Education Course

*Continuing education courses* provide official continuing education units (CEUs) for employees, which may be needed to renew a license or obtain professional registration. A training course can be associated with more than one continuing education course. Using CEUs is optional.

1. From the home page or left menu, click Administer Database under Configure System.
2. In the "Training Course Information" section, select Continuing Education Course.
3. Either select Add New Continuing Education Course and click the `Add` button, or select an existing course to edit from the menu and click the `View` button, then click Update This Information.
4. Enter the **Name** of the continuing education course.
5. Enter the number of **Credit Hours** earned by completing the course.
6. Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it.

### Troubleshooting

**This option is not available.**

Make certain that the In-service Training Management Module has been enabled (see Enable the In-Service Training Management Module{linkID=650}). Only the System Administrator can turn on the module.

**An error message appears when Confirm is clicked.**

Make certain that all required fields have been completed. Fill in any missing fields (outlined in red) and try saving again. If you do not want to add the continuing education course after all, click `Return (do not save changes).`

# iHRIS:Create a Job Structure

iHRIS Manage enables HR Managers and Staff to design and manage a job structure for the organization. Jobs may be categorized by health professional cadre, job classification and salary grade, and may be assigned standard titles, codes and job descriptions. Click Administer Database under Configure System to create the job structure, add new positions that may be filled by employees or applicants and manage existing positions.

## Add Cadres

A *cadre* is a broad category of health workers characterized by the specific training, certification or other qualifications required to practice or be licensed in that field. Examples of cadres include Nurse, Physician and Pharmacist. Each job can be linked to one cadre for reporting purposes. You may add new cadres or edit any cadre that was previously added. Only the HR Manager or System Administrator can update the cadres.

Cadres should only be used to categorize health professionals. Other job categories should be added as job classifications. If your organization does not employ health professionals, you can skip this step.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System. Under the "Create Job Structure" section, select Cadres. | |
| The Cadre page opens, showing all cadres entered in the database. Either click Add New Cadre or select an existing cadre and then click Update This Information to edit it. | |
| The Cadre form opens. Enter the **Name** of the cadre. Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. | |

### Troubleshooting

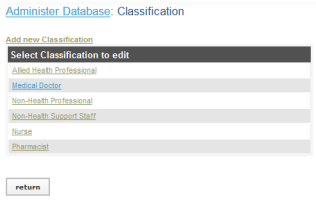
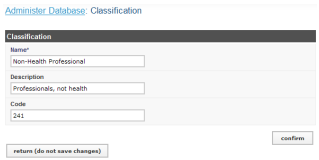
**An error message appears when the Confirm button is clicked.**

Make sure the name of the cadre has not already been entered. Change the name and try saving again. If you do not want to add the cadre after all, click `Return (do not save changes).`

## Add Job Classifications

A *job classification* is a broad category used to organize jobs. Each job can be optionally linked to one job classification for organization and reporting purposes. Examples of job classifications include Manager, Professional, Technician, Service Worker and Clerical Worker.

You should add all the job classifications in use in your organization to the system; you may also edit any job classification previously added. If your organization does not use job classifications to organize jobs, you can skip this step. Only the HR Manager or System Administrator can update job classifications.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>Under the "Create Job Structure" section, select Job Classifications. | |
| The Job Classification page opens, showing all job classifications entered in the database.<br>Either click Add New Job Classification or select an existing job classification and then click Update This Information to edit it. |  |
| The Job Classification form opens.<br>Enter the **Name** of the job classification.<br>Enter a brief **Description** of the job classification (optional).<br>Enter a **Code** for the job classification (optional).<br>Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

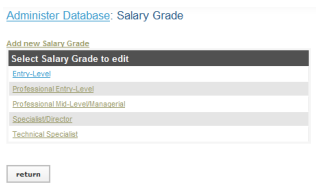
### Troubleshooting

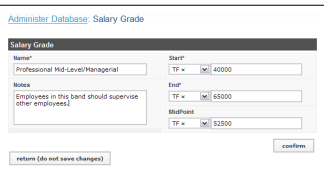
**An error message appears when the Confirm button is clicked.**

Make sure the name of the job classification has not already been entered. Change the name and try saving again. If you do not want to add the cadre after all, click `Return (do not save changes).`

## Add Salary Grades

If your organization defines *salary grades* or bands -- pay ranges for one or more jobs -- add those grades to the system. (If your organization does not define salary grades, you can skip this step.) A job can then be linked to its corresponding salary grade. Only the HR Manager or System Administrator can add or edit salary grades.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>Under the "Create Job Structure" section, select Salary Grades. | |
| The Salary Grades page opens, showing all salary grades entered in the database. Either click Add New Salary Grade or select an existing salary grade and then click Update This Information to edit it. |  |

| | |
|---|---|
| The Salary Grades form opens.<br>Enter the **Name**, or identifier, of the salary grade.<br>Enter any **Notes** to record about the salary grade (optional).<br>Select a **Currency** for the starting salary and enter the amount of the **Start** salary (the lowest salary in the band).<br>Select a **Currency** for the ending salary and enter the amount of the **End** salary (the highest salary in the band).<br>Select a **Currency** for the midpoint salary and enter the amount of the **Midpoint** salary (the midpoint is the average salary in the band offered to a new hire, which may or may not be the equivalent of the true average of the starting and ending salaries). This is optional.<br>Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

## Troubleshooting

**An error message appears when the Confirm button is clicked.**

Make sure that the salary grade name, starting salary and ending salary have been entered and that the salary grade has not previously been entered. Required fields are outlined in red. Fill in any missing information or change the name and try saving again. If you do not want to add the salary grade after all, click `Return (do not save changes).`

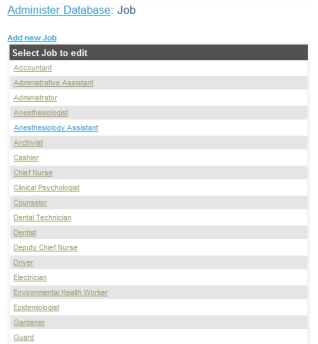
**The correct currency is not available for selection.**

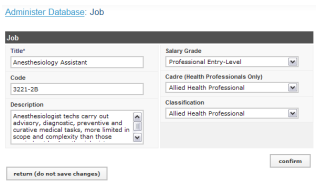
The currency must be added to the system by an HR Manager (see Add a currency).

# Add Jobs

A *job* is a general set of qualifications, duties and responsibilities as specified in a job description. Each job has a unique job code and may be linked to a cadre, job classification and salary grade.

There may be multiple instances of the same job within an organization. Each of these instances is filled by one employee and is referred to as a *position*. Before a position can be created in the system, its generic job must be added. After creating a generic job, it can be reused as needed for multiple positions that perform the same general duties. For example, a Clinical Nurse, Pediatric Nurse and Intensive Care Nurse may all be positions with the same generic job of Nurse. Only the HR Manager or System Administrator can add or edit jobs.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>Under the "Create Job Structure" section, select Jobs. | |
| The Job page opens, showing all jobs entered in the database. Either click Add New Job or select an existing job and then click Update This Information to edit it. |  |

| | |
|---|---|
| The Job form opens.<br>Enter a **Title** for the job.<br>Enter a **Code** for the job (optional).<br>Enter a **Description** for the job (optional).<br>Select the **Salary Grade** for the job (optional).<br>Select the **Cadre** for the job (optional). Only select a cadre for health professional jobs.<br>Select the **Classification** for the job (optional).<br>Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

### Troubleshooting

**An error message displays when the Confirm button is clicked.**

Make sure that the job has not already been added. Change the name and try saving again. If you do not want to add the job after all, click `Return (do not save changes).`

**The correct salary grade is not available for selection.**

The salary grade must be added to the system before adding the job (see Add salary grades).

**The correct cadre is not available for selection.**

The cadre must be added to the system before adding the job (see Add cadres).

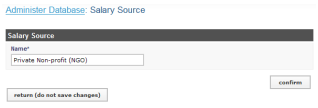
**The correct classification is not available for selection.**

The job classification must be added to the system before adding the job (see Add job classifications).

# iHRIS:Administer Positions

## Add Salary Sources

If your organization tracks multiple monetary sources of salaries and/or special payments, add those to the system so the source can be linked to a salary or special payment. Only the HR Manager or System Administrator can add or edit salary sources.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>Under the "Manage Positions" section, select Salary Sources. | |
| The Salary Source page opens. Either click Add New Salary Source or select an existing salary source and then click Update This Information to edit it. | |
| The Salary Source form opens. Enter the **Name** of the salary source. Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

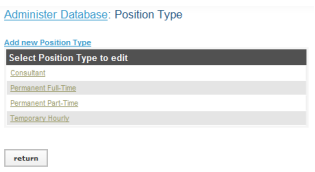
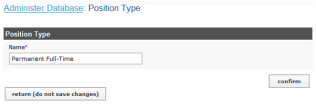
### Troubleshooting

**An error message appears when Confirm is clicked.**

Make sure that the salary source has not already been entered. Change the name and try saving again. If you do not want to add the salary source after all, click `Return (do not save changes).`

## Add Position Types

To classify positions by a category or type, add those position types to the system. Examples of position types include Permanent, Temporary, Consultant, Part-time and the like. Only the HR Manager or System Administrator can add or edit position types.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System. Under the "Manage Positions" section, select Position Types. | |
| The Position Type page opens, showing all position types entered in the database. Either click Add New Position Type or select an existing position type and then click Update This Information to edit it. |  |
| The Position Type form opens. Enter the **Name** of the position type. Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

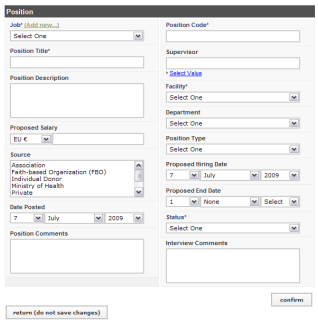
### Troubleshooting

**An error message appears when Confirm is clicked.**

Make sure that the position type has been already been entered. Change the name and try saving again. If you do not want to add the position type after all, click `Return (do not save changes).`

## Add Positions

Adding a position creates a new position in the organization that a single employee will fill. The position must be created before it can be assigned to an existing employee or applications can be accepted for the position. A position that is not linked to an employee but for which you intend to hire someone to fill it is called an *open position*. A position that is not linked to an employee and for which you are not intending to hire someone is called a *discontinued position*. A position that is filled by an employee is called a *closed position*. Either an HR Staff person or an HR Manager can add a new position or update an existing position.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>Under the "Manage Positions" section, select Positions (by Facility). | |
| The Position page opens. Click Add New Position. | |
| The Position form opens.<br>Select the **Job** for the new position.<br>Enter the **Position Title** (this may be the same as the job title).<br>Enter a **Position Description** as an addendum to the job description (optional).<br>Select a **Currency** for the salary and enter the **Proposed Salary** amount for the position; this amount will be changed to the actual salary when the position is filled (optional).<br>If there are one or more salary sources to track for the position, select them in the **Source** box; to select more than one salary source, hold down the CTRL key while clicking the name of each salary source (optional).<br>Today's date displays for the **Date Posted**, the date the position was opened. If this is incorrect, change the date.<br>Enter any comments or notes about the position in the **Position Comments** box (optional).<br>Enter the **Position Code**.<br>Either type or select the code and title of the position that will supervise this position under **Supervisor** (optional).<br>Select the office or facility where the position is located in the **Facility** menu.<br>Select the **Department** where the position is located (optional).<br>Select the **Position Type** (optional).<br>Select the **Proposed Hiring Date** for the position (optional).<br><br>If the position is short-term, select the **Proposed End Date** for the position (optional).<br>Select the **Status** of the position: Open or Discontinued. Select *Open* if you want the position to be available for assignment to an employee.<br>If an interview has been held for the position, enter any comments or notes about it in the **Interview Comments** box (optional).<br>Click `Confirm` and confirm that the name entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

### Troubleshooting

**Instead of creating a new position, you want to use a position that was previously created but was discontinued.**

Under the "Manage Positions" section, select Positions (by Status). Select "Discontinued" from the **Status** menu and click the `View` button; all discontinued positions will display. Select the position to re-open and click Open This Position. Then click Update This Information to edit any of the position's fields.

**An error message displays when Confirm is clicked.**

Make certain that you have completed all required fields. Required fields are outlined in red. Fill in all missing information and try saving again. Also make certain that the position code is unique; the system will not save two positions with the same code. If you do not want to create the position after all, click `Return (do not save changes).`

**The correct job for the position is not available for selection.**

The HR Manager must create the new job before the position can be added (see Add jobs). Click Add New beside the **Job** selection menu to add the job and then follow the steps above to add the position (you will have to re-enter any position information that was previously entered).

**The supervisor's position is not available for selection.**

The supervisor's position must be added to the system before it can be selected. Repeat these steps to add the supervisor's position, then edit the current position to select the correct supervisor (see Edit a position).

**The correct currency is not available for selection.**

The currency must be added to the system by an HR Manager (see Add a currency).

**The correct salary source is not available for selection.**

The salary source must be added to the system by an HR Manager (see Add salary sources).

**The office or facility for the position is not available for selection.**

The office or facility must be added to the system by an HR Manager (see Add an office or facility).

**The department is not available for selection.**

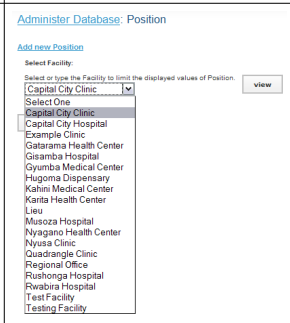
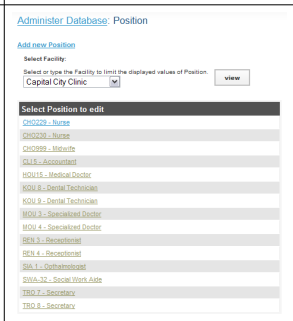
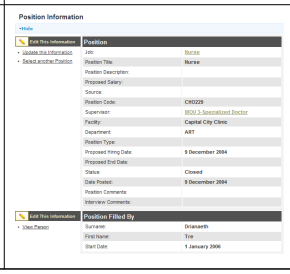
The department must be added to the system by an HR Manager (see Add a department).

**The position type is not available for selection.**

The position type must be added to the system by an HR Manager (see Add position types).

## Edit a Position

Once a position has been created in the system, an HR Staff person or an HR Manager can change any of the information for the position.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System.<br>Under the "Manage Positions" section, select Positions (by Facility) add or edit a position based on the facility where it is located or select Positions (by Status) to add or edit a position based on its status as open, closed or discontinued. | |
| The Position page opens. If you chose Positions (by Facility), select the name of the facility where the position is located from the **Facility** menu. If you chose Positions (by Status), select the status of the position from the **Status** menu. Click the `View` button to display all the positions entered for that facility or status. |  |
| A list of positions already entered in the database appears. Click the name of the position to edit. |  |
| The position information displays. Click Update This Information.<br>The Position form opens, showing the position information that was previously entered. Change any field.<br>Click `Confirm` and confirm that the changed information is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |

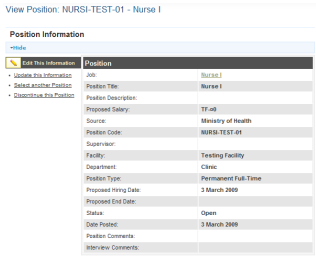
## Troubleshooting

### An error message displays when Confirm is clicked.

Make certain that you have completed all required fields. Required fields are outlined in red. Fill in all missing information and try saving again. Also make certain that the position code is unique; the system will not save two positions with the same code. If you do not want to update the position after all, click `Return (do not save changes).`

## Discontinue a Position

If a position is no longer needed and is not filled by an employee, it can be discontinued. This will prevent the position from displaying in open position lists. The position can be re-opened at any time. Either an HR Staff person or an HR Manager can discontinue a position.

| | |
|---|---|
| From the home page or left menu, click Administer Database under Configure System. Under the "Manage Positions" section, select Positions (by Status). | |
| The Position page opens. Select Open from the **Status** menu and click the `View` button. All of the open positions will display. Click the name of the position to edit. | |
| The position information displays. Click Discontinue This Position to mark the position as discontinued. |  |

To re-open a discontinued position, repeat the steps above but select Discontinued from the **Status** menu. Then click Open This Position beside the position information.

## Troubleshooting

**The position is not displayed in the selection menu.**

Make certain the position has not been filled by an employee. To see all filled positions, select Closed in the **Status** menu; all closed positions will display underneath. You will need to remove the employee from the position before you can discontinue the position (see Record a departure and Record a position change).

}

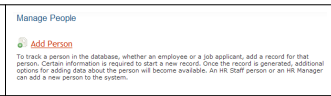
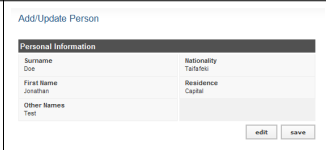
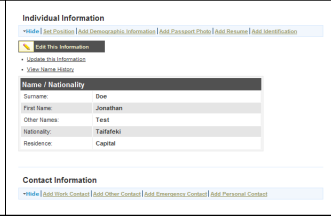
# Managing Employee Records

# iHRIS:Manage People

Click Manage People to add a new employee or applicant record to the system. If you are using the job application module, you can also complete applications for open positions, review completed applications and assign a position to the successful applicant.

## Add Person

To track a person in the database, whether an employee or a job applicant, add a record for that person by clicking the Add Person option. Certain information is required to start a new record. Once the record is generated, additional options for adding data about the person will become available. Either an HR Staff person or an HR Manager can add a new person to the system.

| | |
|---|---|
| On the Home page or in the left side menu, click Manage People. Click Add Person. |   |
| The Add Person form opens. Enter the person's **Surname**, **First Name** and any **Other Names** in the appropriate fields.<br>Select the person's **Nationality** from the menu.<br>Type or select the name of the person's country, region and district of residence under **Residence**.<br>Click `Confirm`. | |
| The data that you just entered will appear. Confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |   |
| The person's new record opens with options to add additional information divided into sections. Note that you can click the Hide/Expand option at the top of any section to hide or display that section. You can edit or update a person's record at any time by searching for the record (see Search Records). |   |

### Troubleshooting

**An error message displays when the Confirm button is clicked.**

Make sure all required fields have been completed. Required fields will be outlined in red. Fill in the missing information and try saving again. If you do not want to add a new record after all, click `Return (do not save changes)`.

**An error message appears when the name is entered.**

There may be another record in the system with the same first name and surname. The system will provide a link to the matching record to review. If the records are for the same person, the original record may be updated with any new information by clicking that link. If the records are for different people, check the box to ignore the error and confirm the new record.

**The nationality is not available for selection.**

The HR Manager must add the nationality as a country (see Add a country).

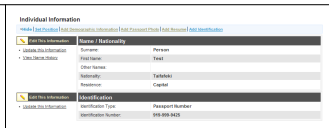
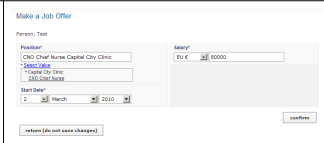
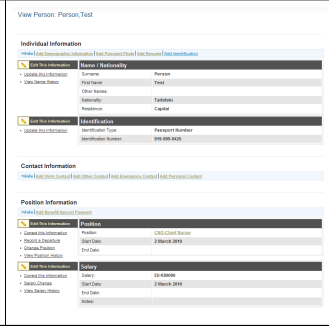
**The correct residence is not available for selection.**

The HR Manager must add the country, region and district before they can be selected (see Add geographical areas).

## Set Position

Immediately after an employee has been added to the system, the employee's record displays. The next step is to set the position that the employee will fill. Until the position has been set, the employee will not appear in any current employee lists. The employee's position must have been created in the system and have been designated as open (the position is not filled by another employee or discontinued).

If an employee leaves a position and is not assigned a new one, that employee is considered an "old employee" who has left the organization. However, the employee may return to work in a new position. In that case, also follow these steps to set a position for the old employee.

| | |
|---|---|
| From the employee's record, click Set Position under the "Individual Information" section. |  |
| The Make a Job Offer form opens.<br>Under **Position**, either type or select the position code and title of the open position that the employee will fill.<br>The **Start Date,** the date that the employee started work in that position, is set to today's date by default. Select a new date from the menu if the start date is different.<br>Under **Salary**, select the currency that the employee is paid in and enter the salary that the employee is paid.<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |
| The new position information will appear in the employee's record in the "Position Information" section. Click the position title to view information about that position. |  |

### Troubleshooting

**The Set Position option does not appear for an old employee.**

The Job Application module is enabled. Complete an application form for the employee (see Add an Application) and then make a job offer for that employee to set the position (see Make a Job Offer). Alternatively, the System Administrator can disable the Application module, and the Set Position option will become available (see Disable the Application Module).

**An error message appears when Confirm is clicked.**

Make certain that a position has been selected and the salary has been entered. All required fields are outlined in red. Fill in the missing information and try saving again. If you do not want to set a position after all, click `Return (do not save changes).`

**There is no open position to set for the employee.**

The position must be created in the system and marked open before it can be assigned to an employee (see Add a position).

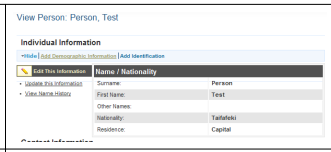
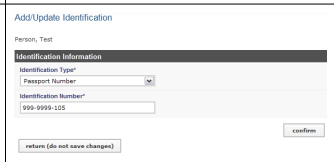
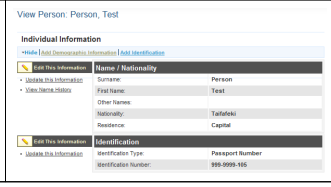
**The correct currency is not available for selection.**

The currency must be added to the system by an HR Manager (see Add a currency).

# iHRIS:Add Employee Information

## Add Identifications

Your organization may require one or more identifications from employees and job applicants. Add this identification information to the person's record. Multiple identifications may be added for a single person.

| | |
|---|---|
| In the person's record under the "Individual Information" section, click Add Identification. |  |
| The Identification form opens.<br>Select the **Identification Type**.<br>Enter the number or other identifier for the identification in the **Identification Number** box.<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |
| The identification information that you just entered displays in the employee's record.<br>Additional identifications can now be added. For each identification, click Add Identification and add the new identification. If any of the identification information needs to be changed, click Update This information beside the incorrect identification to edit it. |  |

### Troubleshooting

**An error message appears when the Confirm button is clicked.**

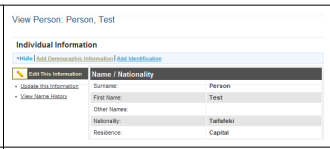
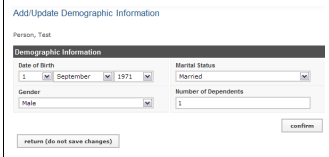
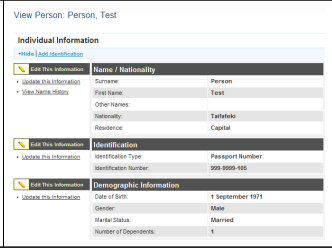
Make certain that all required fields have been completed. Required fields are outlined in red. Fill in the missing information and try saving again. If you do not want to add an identification after all, click `Return (do not save changes).`

**The identification type is not available for selection.**

Only the HR Manager can add new identification types to the system (see Add an identification type).

## Add Demographic Information

Add demographic information about the employee for reporting purposes. Demographic information includes date of birth, gender, marital status and number of dependents. All demographic information is optional.

| | |
|---|---|
| In the person's record under the "Individual Information" section, click Add Demographic Information. |  |
| The Demographic Information form opens.<br>Set the employee's **Date of Birth**.<br>Select the employee's **Gender**.<br>Select the employee's **Marital Status**.<br>Enter the **Number of Dependents** for the employee.<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |
| The demographic information that you just entered displays in the employee's record. If any of the information needs to be changed, click Update This information to edit it. |  |

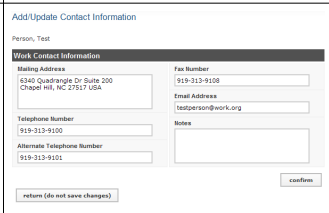
## Troubleshooting

### The correct marital status is not available for selection.

Only the HR Manager can add new marital statuses to the system (see Add a marital status).

# Add Contact Information

For each person in the system, whether an employee or a job applicant, four types of contact information may be added: personal, or home, contact; work contact; emergency contact; and other contact. Only one contact may be added for each type. Contact information may be added at any time after the record is created. All contact fields are optional.

| | |
|---|---|
| In the employee's record, click Contact Information in the side menu to jump to the "Contact Information" section of the record. Click the link for the type of contact information to add. | |
| The Contact Information form opens.<br>Enter the full **Mailing Address**.<br>Enter a primary **Telephone Number**.<br>Enter an **Alternate Telephone Number**, such as a mobile phone.<br>Enter a **Fax Number**.<br>Enter an **Email Address**.<br>Enter any **Notes**, such as the name of an emergency contact.<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |
| The contact information that you just entered displays in the employee's record.<br>Repeat these steps for each type of contact to add for the person.<br>If any of the information needs to be changed, click Update This information beside the incorrect contact information to edit it. | |

### Troubleshooting

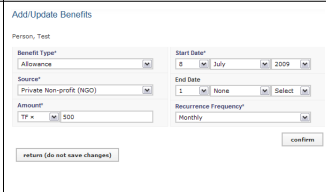
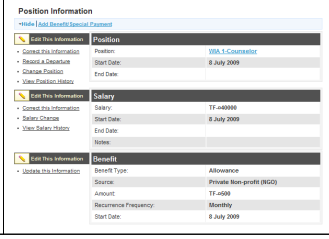
**The correct Add Contact link doesn't appear.**

Make certain that contact information hasn't already been added. For example, if the Add Personal Contact link doesn't appear, check the "Contact Information" section of the employee's record for a "Personal Contact" section. You can then change the previously entered contact information.

# iHRIS:Add Position Information

## Add a Benefit or Special Payment

If an employee receives an irregular or one-time benefit or special payment -- such as an allowance, travel advance or relocation payment -- in addition to the regular salary, that can be noted in the employee's record under the employee's Position Information.

| | |
|---|---|
| In the employee's record, click Position Information in the side menu to jump to the "Position Information" section. Click Add Benefit/Special Payment. | |
| The Benefits form opens.<br>Select the **Benefit Type**.<br>Select the **Source** of the payment.<br>Select the **Currency** for the payment and enter the **Amount**.<br>Select the **Start Date** of the payment.<br>Select the **End Date** of the payment.<br>Select the **Recurrence Frequency** of the payment: once, weekly, monthly or yearly. If the frequency is set to "once," the start date and end date should be the same or the end date may not be entered.<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |
| The information that you just entered displays in the employee's record under the "Position Information" section. Additional benefits or special payments can now be added. For each new benefit, click Add Add Benefit/Special Payment and follow these same steps. If any of the benefits information needs to be changed, click Update This information beside the incorrect benefit to edit it. |  |

### Troubleshooting

**An error message displays when the Confirm button is clicked.**

Make sure that all of the required fields have been completed. The required fields are outlined in red. Fill in the missing information and try saving again. If you do not want to add a special payment after all, click `Return (do not save changes).`

**The correct benefit type is not available for selection.**

The benefit type must be added to the system by an HR Manager (see Add benefit type).

**The correct source is not available for selection.**

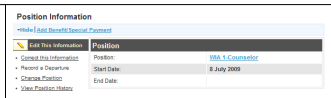
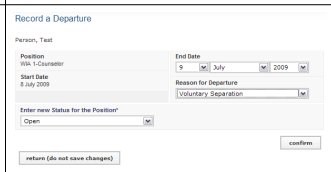
The source must be added to the system by an HR Manager (see Add salary sources).

**The correct currency is not available for selection.**

The currency must be added to the system by an HR Manager (see Add a currency).

## Record a Departure

When an employee leaves the employment of the organization, the date of and reason for departure should be recorded in the employee's record. The employee will become an inactive (or "old") employee in the system, but the employee's data will still be available for historical reporting.

| | |
|---|---|
| In the employee's record, click Position Information in the side menu to jump to the "Position Information" section. Under the position, click Record a Departure. |  |
| The Record a Departure form opens.<br>The **End Date** for employment is set to today's date by default. If that is not correct, change the date.<br>Select the **Reason for Departure**.<br>Select the **New Status** for the position: Open or Discontinued; if the position is marked "Open," it will be available for assignment to another employee or applicant.<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it.<br>The information that you just entered displays in the employee's record under the "Position Information" section. |  |

### Troubleshooting

**An error message is displayed when the Confirm button is clicked.**

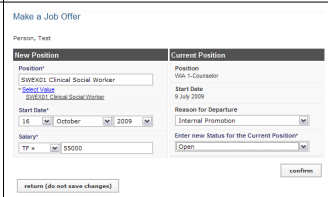
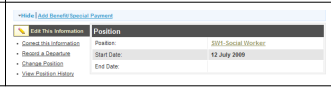
Make sure that all the fields have been completed. Required fields are outlined in red. Fill in any missing information and try saving again. If you do not want to record a departure after all, click `Return (do not save changes)`.

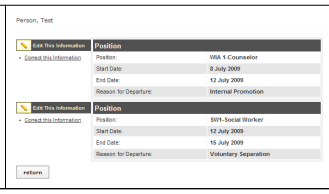
**The reason for departure is not available for selection.**

The HR Manager must add the reason for departure to the system (see Add a reason for departure).

## Record a Position Change

When an employee changes from one position to another in the organization, the position change should be recorded in the employee's record. All of the positions that the employee has held in the organization are saved to the employee's Position History, which can be reviewed at any time.

| | |
|---|---|
| In the employee's record, click Position Information in the side menu to jump to the "Position Information" section. Under the position, click Change Position. | |
| The Make a Job Offer form opens, showing the current position title and start date.<br>Either type or select the position code and title of the new **Position**.<br>The **Start Date** for the new position is set to today's date by default. If this is not correct, change it. This will also be the end date for the employee's old position.<br>Select the **Currency** and enter the amount of the **Salary** for the new position; this may be the same as the employee's previous salary.<br>Under **Reason for Departure**, select the reason for the position change.<br>Select the **New Status** for the position: Open or Discontinued; if the position is marked "Open," it will be available for assignment to another employee or applicant.<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |
| The information that you just entered displays in the employee's record under the "Position Information" section. |  |

| | |
|---|---|
| Click View Position History under the "Position Information" section to view a list of all the positions that the employee has held in the organization, their start dates and end dates, and the reasons why the employee left each position. |  |

### Troubleshooting

**An error message is displayed when the Confirm button is clicked.**

Make sure that all the fields have been completed. Required fields are outlined in red. Fill in any missing information and try saving again. If you do not want to change the position after all, click `Return (do not save changes)`.

**The new position is not available for selection.**

The position must be added first and marked as an open position (see Add a position).

**The reason for the position change is not available for selection.**

The HR Manager must add the reason to the system (see Add a reason for departure).

**The correct currency is not available for selection.**

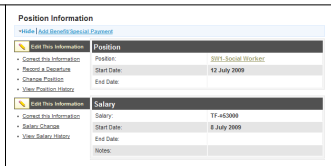
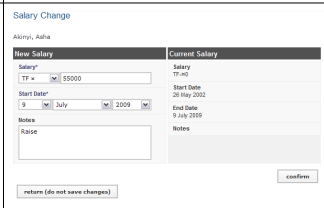
The HR Manager must add the currency to the system (see Add a currency).

**There is an error in any position.**

Click Correct This Information beside the position in the "Position Information" section of the employee's record to correct the error. Only the HR Manager can correct position errors.

## Record a Salary Change

If an employee's salary changes, the new salary can be updated in the employee's record. The old salary will be saved in the employee's Salary History, which may be reviewed at any time.

| | |
|---|---|
| In the employee's record, click Position Information in the side menu to jump to the "Position Information" section. Underneath the "Salary" section, click Salary Change. |  |
| The Salary Change form opens, showing the current salary information.<br>Select the **Currency** and enter the amount of the new **Salary**.<br>The **Start Date** when the new salary will become effective is set to today's date by default. If that is not correct, change it.<br>Enter any **Notes** about the salary change (optional).<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it.<br>The information that you just entered displays in the employee's record under the "Position Information" section.<br>Click View Salary History beside the salary to review the employee's past and current salaries. |  |

### Troubleshooting

**An error message appears when Confirm is clicked.**

Make certain that the required fields have been entered. Required fields are outlined in red. Fill in the missing information and try saving again. If you do not want to change the salary after all, click `Return (do not save changes)`.

**The correct currency is not available for selection.**

The currency must be added to the system by an HR Manager (see Add a currency).

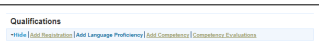
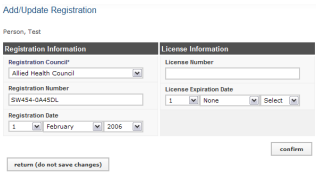
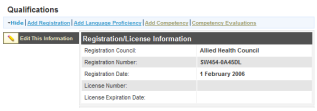
**The salary is incorrect.**

Click Correct This Information beside the salary in the "Position Information" section of the employee's record to correct the error. Only the HR Manager can correct salary errors.

# iHRIS:Add Qualifications

## Add Registration

Many health workers are required to be registered or licensing by a professional licensing board or registration council. Track your employees' registrations or licenses by adding a registration to employees' records.

| | |
|---|---|
| In the person's record, click Qualifications in the side menu to jump to the "Qualifications" section of the record. Click Add Registration. |  |
| The Registration form opens.<br>Select the **Registration Council** that issued the license or registration.<br>Enter the **Registration Number** or **License Number**.<br>For a registration, select the **Registration Date**. For a license, enter the **License Expiration Date**.<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |
| The registration or license information appears on the person's record under the "Qualifications" section. Repeat these steps for each registration or license that the health worker holds. |  |

### Troubleshooting

**An error message appears when Confirm is clicked.**

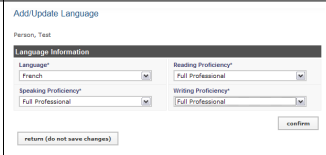
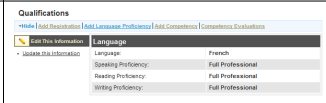
Make certain that all fields have been completed. Required fields are outlined in red. Fill in the missing information and try saving again. If you do not want to add the language after all, click `Return (do not save changes)`.

**The correct registration council is not available for selection.**

The registration council name must be added to the system by an HR Manager (see Add a registration council).

# Add Language Proficiency

To track employees' and applicants' foreign language skills, add language proficiencies to a person's record. Proficiency level in speaking, reading and writing each language can be recorded separately.

| | |
|---|---|
| In the person's record, click Qualifications in the side menu to jump to the "Qualifications" section of the record. Click Add Language Proficiency. | |
| The Language form opens.<br>Select the **Language** to add.<br>Select the person's **Speaking Proficiency** in that language: Elementary, Limited Working, Professional Working, Full Professional or Fluent.<br>Select the person's **Reading Proficiency** in that language.<br>Select the person's **Writing Proficiency** in that language.<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |
| The language information appears on the person's record under the "Qualifications" section. Repeat these steps for each language in which the person is proficient. If any of the language information needs to be changed, click Update This information beside the language proficiency to edit it. |  |

## Troubleshooting

**An error message appears when Confirm is clicked.**

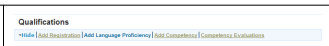
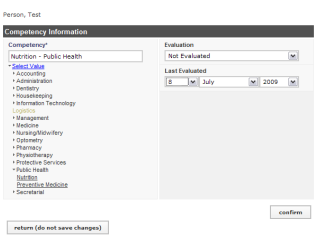
Make certain that all fields have been completed. Required fields are outlined in red. Fill in the missing information and try saving again. If you do not want to add the language after all, click `Return (do not save changes).`

**The correct language is not available for selection.**

The language must be added to the system by an HR Manager (see Add a language).

# Add a Competency

To track employees' and applicants' *competencies*--specific skills that may qualify that person for a particular job--add competencies to a person's record. Each competency is grouped under a broad category, or competency type. An employee's competencies can be evaluated, and evaluations can be updated and tracked in the employee's evaluation history.

| | |
|---|---|
| In the person's record, click Qualifications in the side menu to jump to the "Qualifications" section of the record. Click Add Competency. |  |
| The Competency form opens.<br>Under **Competency** select or type the competency type and then the competency to add.<br>If the employee has been evaluated for the competency, select the **Evaluation** result (optional).<br>Select the date the person was **Last Evaluated** (optional).<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |
| The competency appears on the person's record under the "Qualifications" section. Repeat these steps for each competency that the person has. Update an evaluation by clicking Update This Information beside the competency's name. | |
| After adding the competency, you can review the evaluation history of a single competency by clicking View Evaluation History beside the competency's name, or view all competency evaluations for the employee by clicking Competency Evaluations at the top of the "Qualifications" section. | |

### Troubleshooting

**An error message appears when Confirm is clicked.**

Make certain that all fields have been completed. Required fields are outlined in red. Fill in the missing information and try saving again. If you do not want to add the competency after all, click `Return (do not save changes).`

**The correct competency type is not available for selection.**

The competency type must be added to the system by an HR Manager (see Add a competency type).

**The correct competency is not available for selection.**

The competency must be added to the system by an HR Manager (see Add a competency).

**The evaluation result is not available for selection.**

The competency evaluation must be added to the system by an HR Manager (see Add a competency evaluation).

# iHRIS:Add Trainings

**Please Note:** The In-Service Training Management Module has not yet been updated for iHRIS Manage Version 4.0. It has been disabled by default in the current release, but an update is scheduled for release soon. This documentation will also be updated when that release is available.

## Schedule a Training Course

If an employee is going to take a training course, or the employee has completed a course and needs to be evaluated, schedule the training course for the employee. The Training Manager, as well as HR Staff, can schedule training courses.

1. In the person's record, click Training Courses in the side menu to jump to the "Training Courses" section of the record.
2. Click Schedule Course.
3. Select the **Course Name** from the first menu.
4. The available classes for that course will display in the second menu. Select the **Course** to schedule for the employee.
5. Select the **Request Date**, the date the employee was requested to attend the course (today's date is entered by default).
6. Select the person or group who **Requested** that the employee take the training course.
7. Enter any **Notes** about the course request or scheduling.
8. Select whether the course is a **Retraining** for the employee.
9. Select whether the employee has **Completed** the course.
10. If the employee has been evaluated for the course, select the **Evaluation** result.
11. Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it.

### Troubleshooting

**This option is not available.**

Make certain that the In-service Training Management Module has been enabled (see Enable the In-Service Training Management Module). Only the System Administrator can turn on the module.

**An error message appears when Confirm is clicked.**

Make certain that all fields have been completed. Required fields are outlined in red. Fill in the missing information and try saving again. If you do not want to schedule the training course after all, click `Return (do not save changes)`.

**The correct training course is not available for selection.**

The training course must be added to the system by a Training Manager or HR Manager (see Add a Training Course). At least one class must be scheduled for the training course as well (see Schedule a Course).

**The requestor is not available for selection.**

The requestor must be added to the system by a Training Manager or HR Manager (see Add Requestors of a Training Course).

**The correct evaluation is not available for selection.**

The evaluation must be added to the system by a Training Manager or HR Manager (see Add an Evaluation of a Training Course).

## Evaluate Training Course Competencies

A training course may have competencies associated with it. If so, when an employee completes the training course, the Training Manager or HR Staff may evaluate the employee in the associated competencies. The evaluated competencies are then added to the list of the employee's qualifications.

1. In the person's record, click Training Courses in the side menu to jump to the "Training Courses" section of the record.
2. Beside the course's name, click Course Competency Evaluations.
3. Under each competency associated with the training course, select the **Evaluation** result.
4. Select the **Evaluation Date** (today's date is entered by default).
5. Enter any **Notes** about the evaluation.
6. Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it.

### Troubleshooting

**This option is not available.**

Make certain that the In-service Training Management Module has been enabled (see Enable the In-Service Training Management Module). Only the System Administrator can turn on the module.

**An error message appears when Confirm is clicked.**

Make certain that all fields have been completed. Required fields are outlined in red. Fill in the missing information and try saving again. If you do not want to evaluate the competency after all, click `Return (do not save changes)`.

**The correct competency does not appear for the training course.**

The HR Manager or Training Manager must associate the competency with the training course (see Add a Training Course).

**The correct evaluation is not available for selection.**

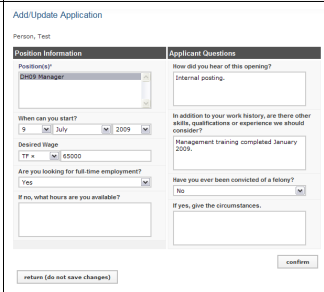
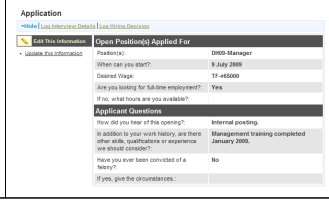
The evaluation must be added to the system by an HR Manager (see Add a Competency Evaluation).

# iHRIS:Add an Application

## Add Application

A job application can be added for any person in the system. Adding a job application puts the person in consideration for any open position. Records with a completed job application but that do not already have a set position are considered "applicants" rather than employees of the organization. Employees with a set position can also have a job application on file for open positions, to manage internal hiring efforts. Until the applicant has applied for an open position, the applicant will not appear in any applicant lists. The applicant may only apply for positions that have been created in the system and have been designated as open (the position is not filled by another employee or discontinued).

If your organization does not need to track job applications, the Application module can be disabled by the System Administrator (see Disable the Application Module).

| | |
|---|---|
| In the person's record, click Application in the left menu to jump to the "Application" section of the record. Click Add Application. | |
| The Application form opens.<br>Under **Position(s)**, select the open position that the applicant is applying for; select more than one position by holding down the CTRL key while clicking each position.<br>Complete as many of the other **Applicant Questions** as are applicable.<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |
| The completed application displays in the person's record. Now managers and HR personnel can review the application, make notes about the interview process and hiring decision, and make a job offer to the applicant. The application will remain on file even after the position is filled, but it can be updated at any time by clicking Update This Information. |  |

## Troubleshooting

**The Add Application option does not appear.**

The Application module may be disabled. Consult your System Administrator (see Disable the Application Module).

**An error message appears when Confirm is clicked.**

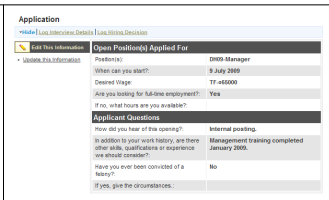
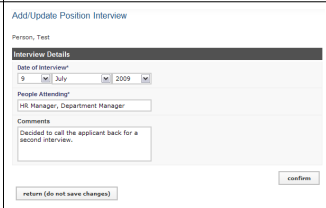
Make certain that a position has been selected for the application. The position is required. Other applicant questions may also be required. All required fields are outlined in red. Fill in the missing information and try saving again. If you do not want to add an application after all, click `Return (do not save changes).`

**No positions are available.**

There must be at least one open position that the applicant can apply for. To create an open position, add a new position and mark it as open (see Add positions), open a previously discontinued position (see Discontinue a position) or if the position is filled by another employee, record a position change (see Record a position change) or departure (see Record a departure) for that employee.

# Log Interview Details

While an applicant is under review, record details about any interviews with the applicant.

| | |
|---|---|
| In the person's record, click Application in the left menu to jump to the "Application" section of the record. Click Log Interview Details. |  |
| The Position Interview form opens.<br>The **Date of Interview** is set to today's date by default. If this is incorrect, change it.<br>Enter the names or titles of **People Conducting Interview**.<br>Enter any **Comments** about the interview (optional).<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |
| The details of each interview are displayed in the person's record under the "Application" section and can be reviewed at any time. Update these details by clicking Update This Information.<br>Repeat the process for each additional interview. | |

## Troubleshooting

**This option is not available.**

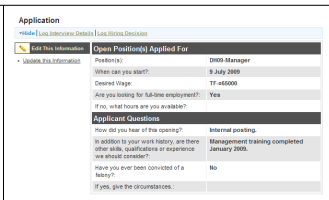
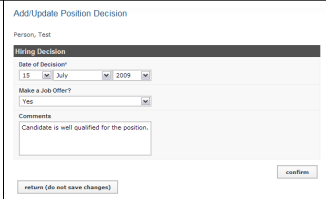
The Application module may be disabled. Consult your System Administrator (see Disable the Application Module).

**An error message appears when Confirm is clicked.**

Make certain that the required fields have been completed. All required fields are outlined in red. Fill in the missing information and try saving again. If you do not want to log an interview after all, click `Return (do not save changes).`

# Log Hiring Decision

While an applicant is under review, log the details of the decision made concerning the job application. Note that if the applicant is hired, the position will also need to be set for the applicant in addition to logging the decision (see Make a job offer).

| | |
|---|---|
| In the person's record, click Application in the left menu to jump to the "Application" section of the record. Click Log Hiring Decision. |  |
| The Position Decision form opens.<br>The **Date of Decision** is set to today's date by default. If this is incorrect, change it.<br>Under **Make a Job Offer?** select Yes or No. This will not set the new position. That needs to be done in a separate step (see Make a job offer).<br>Enter any **Comments** about the decision (optional).<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |
| The hiring decision details are displayed in the person's record under the "Application" section and can be reviewed at any time. Update these details by clicking Update This Information. | |

### Troubleshooting

**This option is not available.**

The Application module may be disabled. Consult your System Administrator (see Disable the Application Module).

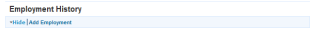
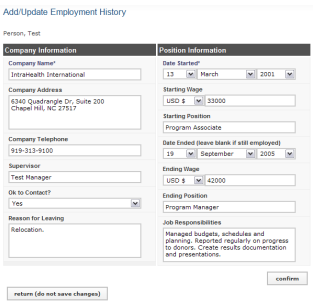
**An error message appears when Confirm is clicked.**

Make certain that all the required fields have been completed. All required fields are outlined in red. Fill in the missing information and try saving again. If you do not want to log a decision after all, click `Return (do not save changes).`

# iHRIS:Add Employee History

## Enter Employment History

As part of completing the job application, the applicant's employment history should be recorded. The employment history can also be added to the record of any employee of the organization.

| | |
|---|---|
| In the person's record, click Employment History in the left menu to jump to the "Employment History" section. Click Add Employment. |   |
| The Employment History form opens.<br>In the "Company Information" section, enter the **Company Name** where the person previously worked.<br>Enter the **Company Address** (optional).<br>Enter the **Company Telephone** (optional).<br>Enter the name of the applicant's **Supervisor** (optional).<br>Under **OK to Contact?** select Yes or No for whether it is OK to contact the applicant's former employer.<br>Enter the **Reason for Leaving** the former employer (optional).<br>In the "Position Information" section, enter the **Date Started** at that employer.<br>Select the **Currency** for and enter the amount of the **Starting Wage** (optional).<br>Enter the title of the **Starting Position** (optional).<br>Enter the **Date Ended**; leave this field blank of the applicant is presently employed by the company.<br>Select the **Currency** for and enter the amount of the **Ending Wage** (optional).<br>Enter the title of the **Ending Position** at the company (optional).<br>Enter the **Job Responsibilities** (optional).<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  Add/Update Employment History<br>Person, Test<br>Company Information<br>Position Information<br>Company Name*<br>IntraHealth International<br>Company Address<br>6340 Quadrangle Dr, Suite 200<br>Chapel Hill, NC 27517<br>Company Telephone<br>919-313-9100<br>Supervisor<br>Test Manager<br>Ok to Contact?<br>Yes<br>Reason for Leaving<br>Relocation.<br>Date Started*<br>13 March 2001<br>Starting Wage<br>USD $ 33000<br>Starting Position<br>Program Associate<br>Date Ended (leave blank if still employed)<br>19 September 2005<br>Ending Wage<br>USD $ 42000<br>Ending Position<br>Program Manager<br>Job Responsibilities<br>Managed budgets, schedules and planning. Reported regularly on progress to donors. Create results documentation and presentations.<br>confirm<br>return (do not save changes) |
| The past employment displays in the person's record under the "Employment History" section.<br>Click Update This Information beside the employer to edit any of the fields, if necessary.<br>Repeat this process for each former employer. | Employment History<br>Hide \| Add Employment<br>Edit This Information<br>Update this Information<br>Employer Information<br>Company Name: IntraHealth International<br>Company Address: 6340 Quadrangle Dr, Suite 200 Chapel Hill, NC 27517<br>Company Telephone: 919-313-9100<br>Supervisor: Test Manager<br>Ok to Contact?: Yes<br>Reason for Leaving: Relocation.<br>Date Started: 13 March 2001<br>Starting Wage: USD $33000<br>Starting Position: Program Associate<br>Date Ended (leave blank if still employed): 19 September 2005<br>Ending Wage: USD $42000<br>Ending Position: Program Manager<br>Job Responsibilities: Managed budgets, schedules and planning. Reported regularly on progress to donors. Create results documentation and presentations. |

### Troubleshooting

**An error message displays when the Confirm button is clicked.**

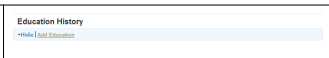
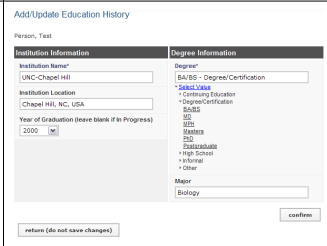
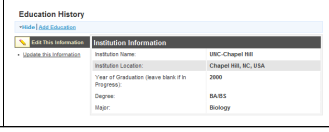
Make certain that all required fields have been completed. Required fields are outlined in red. Fill in the missing information and try saving again. If you do not want to enter a past employer after all, click `Return (do not save changes).`

**The correct currency is not available for selection.**

The HR Manager needs to add the currency to the system (see Add a currency).

## Enter Education History

As part of completing the job application, the applicant's education history should be recorded. The education history can also be added to the record of any employee of the organization.

| | |
|---|---|
| In the person's record, click Education History in the left menu to jump to the "Education History" section. Click Add Education. |  |
| The Education History form opens.<br>Enter the **Institution Name**.<br>Enter the **Institution Location** (optional).<br>Select the **Year of Graduation**; leave this option blank if education is still in process.<br>Type or select the **Degree** earned.<br>Enter the **Major** (optional).<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. |  |
| The past education displays in the person's record under the "Education History" section. Click Update This Information beside the employer to edit any of the fields, if necessary.<br>Repeat this process for each educational institution attended. |  |

### Troubleshooting

**An error message displays when the Confirm button is clicked.**

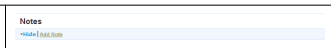
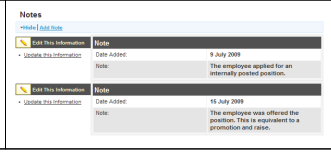
Make certain that all required fields have been completed. Required fields are outlined in red. Fill in the missing information and try saving again. If you do not want to enter a degree after all, click `Return (do not save changes).`

**The correct degree is not available for selection.**

The HR Manager must add the education type and degree to the system (see Add an education type and Add a degree).

## Add Notes

At any time, an HR Staff person or an HR Manager may add notes to a person's record. All notes are saved to a log and may be reviewed as necessary.

| | |
|---|---|
| In the person's record, click Notes in the left menu to jump to the "Notes" section. Click Add Note. |  |
| The Notes form opens.<br>Enter a **Date Added** for the note; if no date is entered, today's date is saved by default.<br>Enter the text of the **Note**.<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. | |
| All notes will appear at the bottom of the person's record under the "Notes" section. Repeat these steps to add additional notes. |  |

### Troubleshooting

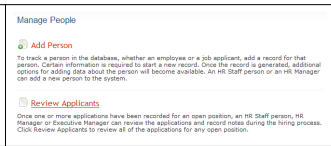
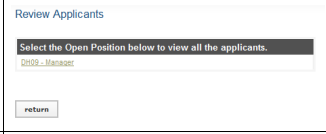
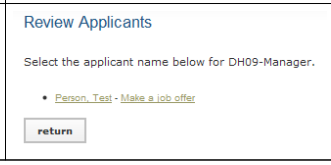
**An error message displays when the Confirm button is clicked.**

Entering the note text is required. The required field is outlined in red. Try filling in the missing field and saving again. If you do not want to enter a note after all, click `Return (do not save changes).`

# iHRIS:Manage Job Applicants

## Review Applicants

Once one or more applications have been recorded for an open position, an HR Staff person, HR Manager or Executive Manager can review the applications for that position. HR Staff or the HR Manager can also record interview details or the hiring decision while reviewing applicants (see Log interview details and Log hiring decision). Click Review Applicants on the Manage People screen to review all of the applications for any open position.

| | |
|---|---|
| From the Home page or left menu, click Manage People. The Manage People page opens.<br>Click Review Applicants. |  |
| The Review Applicants page opens, listing all open positions for the organization. Click the open position to review. |  |
| The names of all applicants for the position display. Click any applicant's name to review the person's full record, including their application for the position, and to update the person's information, if necessary. |  |

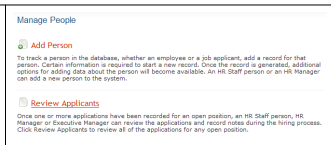
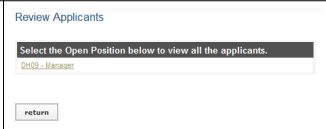
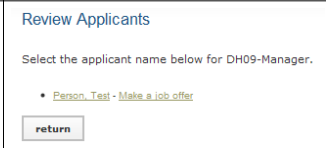
### Troubleshooting

**This option is not available.**

The Application module may be disabled. Consult your System Administrator (see Disable the Application Module).

## Make a Job Offer

Once the decision has been made to offer an applicant a position and the applicant has accepted, the applicant should be converted to an employee. This is done by assigning the position that the applicant has applied for to the applicant. Either an HR Staff person or an HR Manager can set the position.

| | |
|---|---|
| From the Home page or left menu, click Manage People. The Manage People page opens.<br>Click Review Applicants. |  |
| The Review Applicants page opens, listing all open positions for the organization. Click the open position that you want to assign to the applicant. |  |
| The names of all applicants for the position display. Click Make a job offer beside the name of the applicant who will be hired. |  |
| The Make a Job Offer form opens.<br>The **Start Date** for the new position is set to today's date by default. Enter a new date if it is different.<br>Select the **Currency** that the employee is paid in and enter the **Salary** for the position.<br>Click `Confirm` and confirm that the information entered is correct. If it is not correct, click `Edit` to change it. If it is, click `Save` to save it. | |

### Troubleshooting

**This option is not available.**

The Application module may be disabled. Consult your System Administrator (see Disable the Application Module).

**An error message appears when Confirm is clicked.**

Make certain that a position has been selected for the application and other required fields have been completed. All required fields are outlined in red. Fill in the missing information and try saving again. If you do not want to make the job offer after all, click `Return (do not save changes).`

**The correct currency is not available for selection.**

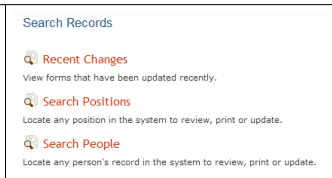
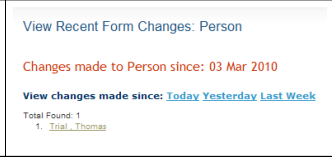
The currency must be added to the system by an HR Manager (see Add a currency).

# iHRIS:Search Records in iHRIS Manage

After entering an employee or position in the system, the record may be reviewed at any time. Click Search Records to locate the record. From the record, additional information can be added or existing information can be updated.

## Recent Changes

Follow these steps to locate a recent change made to a form or record, including recently added records. These changes may not show up in other reports or searches for 20 minutes (after change made).

| | |
|---|---|
| From the Home page or left menu, click Search Records. On the Search Records page, click Recent Changes. |  |
| The Search form opens.<br>Select to view recent changes to Person or Position. If an option is not selected, all records will be searched.<br>Click the `View` button to show all matching results. | |
| A list of matching records with changes made **Today** will be displayed. You can also choose to review changes made **Yesterday** or **Last Week**. Click on the record you want to review. |  |

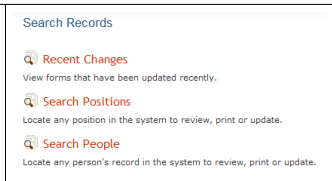
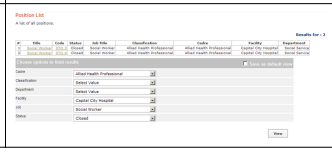
### Troubleshooting

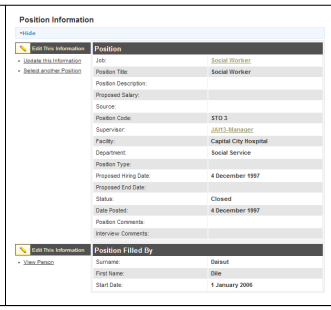
**The record is not found.**

No results will display. Select different options and click `View` to search again. Try reducing the number of options selected for better results.

## Search Positions

Follow these steps to locate a position's record in the system.

| | |
|---|---|
| From the Home page or left menu, click Search Records. On the Search Records page, click Search Positions. |  |
| The Search form opens.<br>Select from the options provided to limit the search by **Cadre, Classification, Department, Facility, Job** or **Status**. If an option is not selected, all records will be searched.<br>Click the `View` button to show all matching results. | |
| A list of matching positions displays. Click the title of the position you want to review.<br>To search again, select new options from the Search form and click `View`. |  |

| | |
|---|---|
| When you click the position title, the position record displays, showing all information about the position and the name of the employee currently holding the position, if any. From this screen, you can update the position information, select another position or view and update the employee's record. |  |

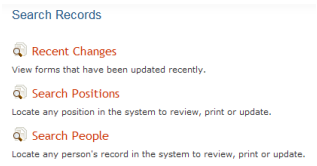
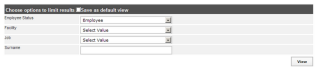
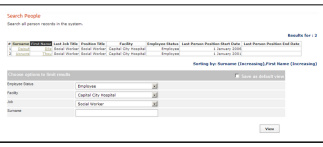
### Troubleshooting

**The record is not found.**

No results will display. Select different options and click `View` to search again. Try reducing the number of options selected for better results.

## Search People

Follow these steps to locate an employee's record in the system.

| | |
|---|---|
| From the Home page or left menu, click Search Records. On the Search Records page, click Search People. |  |
| The Search form opens.<br>In the **Employee Status** menu, select the type of record to search for: Applicant, Employee, Old Employee or Old Applicant. Leave blank to search all employees.<br>Limit the search to a particular facility by selecting that facility name from the **Facility** menu. Leave blank to search all facilities.<br>Limit the search to a particular job by selecting that job title from the **Job** menu. Leave blank to search all jobs.<br>Enter the person's **Surname** to find a single record or leave blank to find multiple records.<br>Click the `View` button to show all matching results. |  |
| A list of matching records displays. Click the name of the person whose record you want to review.<br>To search again, select new options from the Search form and click `View`. |  |

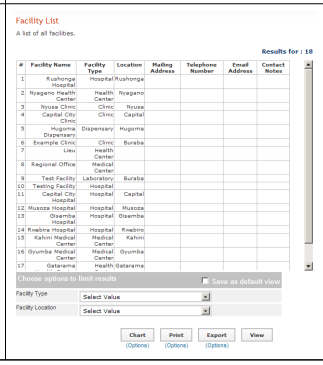
### Troubleshooting

**The record is not found.**

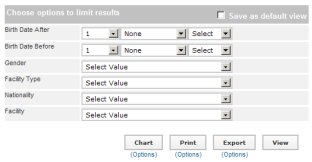
No results will display. Select different options and click `View` to search again. Try reducing the number of options selected for better results.

# iHRIS:Run Reports in iHRIS Manage

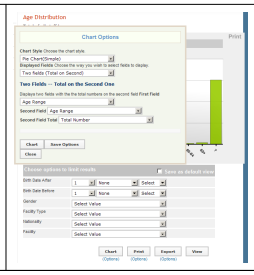
Report views for analyzing data entered in iHRIS are created by the Administrator or Manager for other users to access (see The Customized Report Builder for more information). Several predefined report views are included when iHRIS is installed.

| | |
|---|---|
| To access the reports, click View Reports in the main menu or left navigation menu. All of the saved report views are displayed.<br>Reports are organized by category depending on the type of data displayed. Pre-defined categories include Facility Report, Position Reports, Search, and Staff Reports. | |
| To run a report, click its name. Reports will display according to the set default view - either as a table, pie chart, or bar chart. For table display, change the sort order by clicking any column name. In most table reports, you can also click an employee's name, a position title or code, or a facility name to display the full record for that person, position or facility. |  |

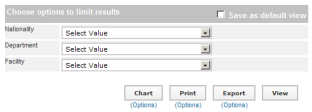
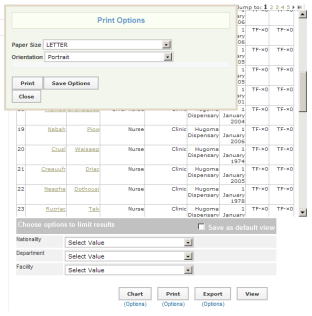
## Filtering Reports

| | |
|---|---|
| Under "Choose options to limit results," there are filtering options to limit the data analyzed. The filters differ depending on the type of report selected. For example, some reports can be filtered by gender, so that only results for male or female health workers will be shown. Others can be filtered by cadre, birth date, or facility, to limit the analyzed data to a particular location. If no filters are selected, then the report will include all data entered in the system. Once you have selected filters and other settings for the report, click the `View` button to display the report with your selected changes. |  |

## Charting Reports

| | |
|---|---|
| Table reports can be converted to charts, and charts can be displayed differently. First, select the charting options by clicking Options under the `Chart` button. You can graph the data in pie chart, bar chart, column chart or scatter plot form. You must also select whether to chart one or two fields and which fields to display in the chart. Once the charting options are set, click the `Chart` button to display the report as a chart with the selected options. Move the mouse over the chart to display aggregated totals. Print a chart by clicking the `Print` option in the upper right corner. |  |

# Exporting and Printing Reports

| | |
|---|---|
| Click the `Export` button to export the report data for use in Excel spreadsheets and other systems. The default is to export the data as a comma-separated values file suitable for importing into Excel. To export in tab-delimited or HTML format, click Options under the `Export` button.<br>Once you click `Export`, you will be prompted to save the file to a location on your computer. To import the data into a spreadsheet, open Excel and choose **Get External Data**. You must then choose the type of file you exported--comma- or tab-delimited--for Excel to display the data correctly. |  |
| Finally, you can export the report as a formatted PDF file suitable for saving and printing by clicking the `Print` button. Click Options under the `Print` button to change the paper size and orientation. |  |

# About Windows iHRIS

# iHRIS:Using Windows iHRIS

A Windows version of the iHRIS Suite has been developed for use in locations where there is no or limited Internet access or where no Linux server is available. It installs a single-user instance of all three components of the iHRIS Suite on the Windows desktop: iHRIS Manage, iHRIS Qualify and iHRIS Plan. Please note that **iHRIS WINDOWS IS BASED ON AN OLDER, OUT OF DATE VERSION OF iHRIS.**

Choose the Windows version for installation in decentralized locations, such as a hospital, health facility or local government office, where network connectivity and technical support may not be as reliable, understanding that there are greater security and data quality risks associated with the Windows version. In that situation, it is recommended that iHRIS be installed on a Windows computer that is physically secure from unauthorized access, that is not used for any purpose other than running iHRIS and that access to iHRIS be limited to as few users as practicable.

Windows iHRIS may also be installed with sample data as a demonstration of the program before installing the full server-based version. Advanced users may export data from Windows iHRIS for import into a server-based version of iHRIS using the PHP MyAdmin tool included with Windows iHRIS.

## Install Windows iHRIS

You must download Windows iHRIS as a separate installer. Go to the Software Downloads page (http://www.capacityproject.org/hris/suite/ihris_software.php) on the HRIS Strengthening website to download the software.

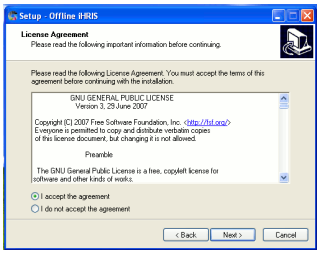
Windows iHRIS requires Windows XP, 500MB hard disk space and 1GB RAM. A web browser is required to run the software. Firefox 2+ or Internet Explorer 7+ is highly recommended.

Follow these steps to install the software:

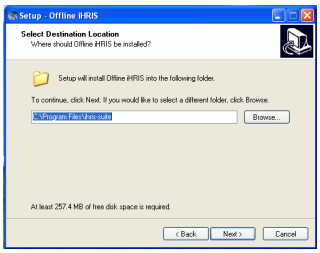
Download the executable file (latest version) from Launchpad to a Windows XP computer. Quit all running programs. Run the executable.
The installation wizard will start. Click Next when prompted.

Setup - Offline iHRIS
Welcome to the Offline iHRIS Setup Wizard
This will install Offline iHRIS 3.1 on your computer.
It is recommended that you close all other applications before continuing.
Click Next to continue, or Cancel to exit Setup.
USAID
Capacity Project
Next >
Cancel

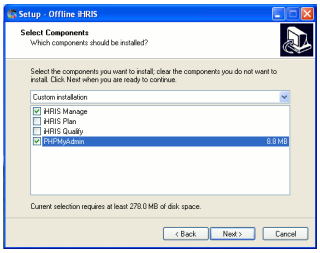
When prompted, read and accept the license agreement, and click Next.


Setup - Offline iHRIS
License Agreement
Please read the following important information before continuing.
Please read the following License Agreement. You must accept the terms of this agreement before continuing with the installation.
GNU GENERAL PUBLIC LICENSE
Version 3, 29 June 2007
Copyright (C) 2007 Free Software Foundation, Inc. <http://fsf.org/>
Everyone is permitted to copy and distribute verbatim copies of this license document, but changing it is not allowed.
Preamble
The GNU General Public License is a free, copyleft license for software and other kinds of works.
I accept the agreement
I do not accept the agreement
< Back
Next >
Cancel

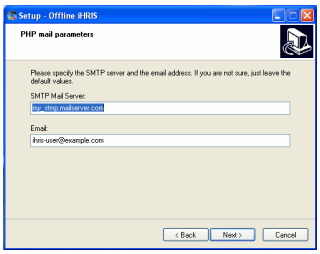
Choose the directory where to install the program. The default directory is recommended for fastest loading times. Click Next.


Setup - Offline iHRIS
Select Destination Location
Where should Offline iHRIS be installed?
Setup will install Offline iHRIS into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.
C:\Program Files\ihris-suite
Browse...
At least 257.4 MB of free disk space is required.
< Back
Next >
Cancel

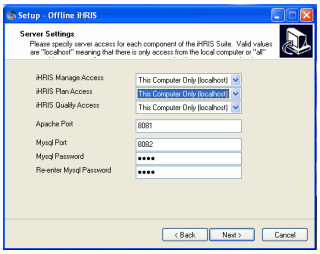
Select which of the iHRIS components to install: iHRIS Qualify [1], iHRIS Manage [2] and/or iHRIS Plan [3].
Select whether to install PHP MyAdmin [4]; this tool will help you manage the database and import or export data (advanced users). Click Next.


Setup - Offline iHRIS
Select Components
Which components should be installed?
Select the components you want to install; clear the components you do not want to install. Click Next when you are ready to continue.
Custom installation
iHRIS Manage
iHRIS Plan
iHRIS Quality
PHPMyAdmin
8.9 MB
Current selection requires at least 278.0 MB of disk space.
< Back
Next >
Cancel

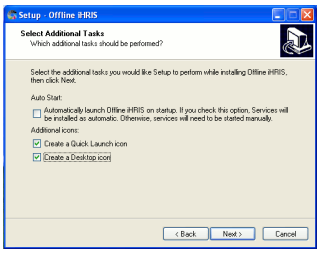
Specify an SMTP server and email address to use with the software. If unsure, keep the defaults and click Next.


Setup - Offline iHRIS
PHP mail parameters
Please specify the SMTP server and the email address. If you are not sure, just leave the default values.
SMTP Mail Server:
Email:
ihris-user@example.com
< Back
Next >
Cancel

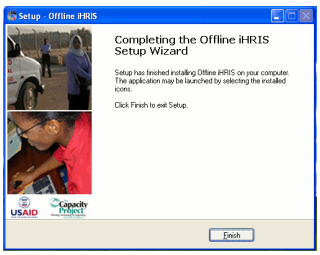
For each component installed, select whether to limit access to the local computer only or make it available on a local area network.
Enter the appropriate ports for the Apache and MySQL servers. If unsure, keep the defaults.
Enter and re-enter a password for the MySQL database, and click Next. *You cannot proceed with the installation without entering a database password.*




Specify whether to automatically launch Windows iHRIS once the installation is completed (recommended).
Select whether to create a Quick Launch and/or a Desktop icon for Windows iHRIS, and click Next.


Setup - Offline iHRIS
Select Additional Tasks
Which additional tasks should be performed?
Select the additional tasks you would like Setup to perform while installing Offline iHRIS, then click Next.
Auto Start:
Automatically launch Offline iHRIS on startup. If you check this option, Services will be installed as automatic. Otherwise, services will need to be started manually.
Additional icons:
Create a Quick Launch icon
Create a Desktop icon
< Back
Next >
Cancel

Click Install and wait for Windows iHRIS to install.
Click Finish when the installation is complete.


Setup - Offline iHRIS
Completing the Offline iHRIS Setup Wizard
Setup has finished installing Offline iHRIS on your computer. The application may be launched by selecting the installed icons.
Click Finish to exit Setup.
USAID
Capacity Project
Finish

*Note:* If you have installed Windows Firewall, you will be prompted to unblock the firewall for Windows iHRIS at the end of installation. Select the option to unblock the firewall.

## Set Up Windows iHRIS

If Windows iHRIS does not launch immediately following installation, launch it from Programs on the Start menu, or double-click the desktop icon. The iHRIS icon appears in the taskbar (lower right hand corner of your screen) when Windows iHRIS is running.

1. The splash screen appears in your web browser with the components of the iHRIS suite that you installed. Click on a component to load it.
2. The first time a component loads may take some seconds. Do not click Reload while the component is loading.
3. You will be prompted to change your password. Click "Change Password" on any page to do this. (For more information, see the section Change Password.)
4. You will be prompted to create a non-administrator user for everyday use. Click "Configure System", then "Administer Users" to do this. (For more information, see the section Add a User.)
5. You will be prompted to load modules and sample data. The choices are:

- **Training Management module (iHRIS Manage only):** This module enables you to set up a training program and schedule training classes for employees.
- **Base Data (iHRIS Manage and Qualify):** Includes standard data lists such as marital status and countries; recommended for most users. Base data can be edited after loading.
- **Medical Base Data (iHRIS Manage and Qualify):** Includes standard data lists for public health such as cadres and facilities; recommended for public health (such as Ministry of Health) users. Medical base data can be edited after loading.
- **Sample Data (all components):** A fictional dataset intended for demonstration purposes only. Not recommended for users who intend to enter their own data in the system.

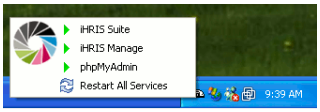
If you intend to use Windows iHRIS to enter and manage data, we recommend unchecking all sample data.

Note that enabling modules and sample data takes a few seconds. The system displays a message when the modules and data are successfully loaded.

## Using Windows iHRIS

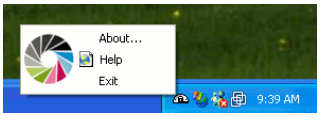
While Windows iHRIS is running, the iHRIS icon appears in the taskbar in the lower right corner of your screen.

To switch between any of the components or return to the main screen, left-click this icon.




You can also launch PHP MyAdmin, a tool for directly managing your databases and exporting or importing data (advanced users only). For help with using PHP MyAdmin, see the PHP MyAdmin website ([5]

To quit Windows iHRIS, right-click the taskbar icon and select Exit.



# References

[1] http://www.capacityproject.org/hris/suite/ihris_qualify.php
[2] http://www.capacityproject.org/hris/suite/ihris_manage.php
[3] http://www.capacityproject.org/hris/suite/ihris_plan.php
[4] http://www.phpmyadmin.net/home_page/index.php
[5] http://www.phpmyadmin.net/home_page/index.php).

# Back Matter

## iHRIS:Data Dictionary

| Field Name or Value | Definition | Alternate Names | Data Type | Used In |
|---|---|---|---|---|
| **2 character alpha code** | The unique two-character code that identifies a country established by the International Organization for Standards (ISO). | alpha code | text entry | all |
| **academic level** | The highest level of formal education attained by a person. | educational level | selection | iHRIS Qualify |
| **address in new country** | The mailing address given by a health worker who is out migrating to a foreign country. | - | text entry | iHRIS Qualify |
| **administrator** | A role that has full access to all functions in the system; this role is responsible for configuring the system and managing user accounts. | system administrator | value (Role) | all |
| **alternate telephone number** | A secondary phone number where a person or organization can be reached. | cell phone number, mobile number | text entry | iHRIS Manage, iHRIS Qualify |
| **amount** | The total amount of a benefit or special payment. | - | selection (from Currency) + number | iHRIS Manage |
| **applicant** | A person who has applied for an open position. | job applicant | value (from Employee Status) | iHRIS Manage |
| **application date** | The date a person applied to take an exam, to register as a health worker or for an open position. | application | date | iHRIS Qualify |
| **available hours** | The number and times of hours a person who is applying for part-time employment is available to work. | hours | text entry | iHRIS Manage |
| **average salary** | The average annual salary paid to an employee in a particular group, such as a cadre or pool of workers. | - | selection (from Currency) + number | iHRIS Plan |
| **benefit type** | A type of payment made to an employee that is separate from the employee's salary; the payment may be one-time or recurring. | benefit, special payment | selection | iHRIS Manage |
| **birthplace** | The geographical location where a person was born. | - | selection (Country + Region + District) | iHRIS Qualify |
| **cadre** | A broad category or subset of health workers characterized by the specific training, degree or other qualifications required to practice or be licensed in that field (i.e., nurse). | health cadre | selection | all |
| **cadre pool** | A pool of health workers, composing part or all of a cadre, to which assumptions are applied in a workforce projection. | pool | selection | iHRIS Plan |

| | | | | |
|---|---|---|---|---|
| **category** | A broad subject area. | disciplinary action category, disruption category, projection category, training course category | selection or text entry | iHRIS Manage, iHRIS Qualify, iHRIS Plan |
| **certificate** | Certifies that a particular academic level has been achieved. | - | selection | iHRIS Qualify |
| **certificate number** | Identifies a particular certificate issued to a student. | - | text entry | iHRIS Qualify |
| **classification** | A broad category used to organize jobs; the job classification may or may not be equivalent to the health cadre. | job classification | selection | iHRIS Manage |
| **closed** | Position status that designates a position that has been filled by an employee; when a position is marked closed, the organization is not actively hiring for the position. | closed position | value (Position Status) | iHRIS Manage |
| **code** | Short identifier for an item, usually unique. | - | text entry | iHRIS Manage, iHRIS Qualify |
| **comments** | Notes about a position, job interview or job offer. | interview comments, position comments | text entry | iHRIS Manage |
| **company address** | The address of a person's employer. | - | text entry | iHRIS Manage |
| **company name** | The name of a person's employer. | company, employer, organization | text entry | iHRIS Manage |
| **company telephone** | The telephone number of a person's employer. | company phone, company telephone number | text entry | iHRIS Manage |
| **competency** | A skill performed to a specific standard under specific conditions. | competencies provided | selection | iHRIS Manage |
| **competency type** | A broad category of related competencies. | - | selection | iHRIS Manage |
| **contact type** | A preset category of contact information. | - | selection (preset values) | iHRIS Manage, iHRIS Qualify |
| **continuing education course** | A course that is required for a health worker to renew his/her license while practicing. | continuing education | selection | iHRIS Manage, iHRIS Qualify |
| **cost** | The amount of money associated with a change in the number of workers based on salary and other associated costs, such as training costs or severance pay. | average cost | selection (from Currency) + number | iHRIS Plan |
| **cost increase** | An annual increase in the cost associated with a change in the number of workers expressed as a percentage of the original cost. | - | number | iHRIS Plan |
| **country** | An independent nation state. | nation | selection | all |
| **country trained in** | A foreign country where a health worker received training. | - | selection (from Country) | iHRIS Qualify |

| | | | | |
|---|---|---|---|---|
| **county** | The smallest geographic subset, typically located within a district. | sector | selection | iHRIS Manage, iHRIS Qualify |
| **credit hours** | The amount of credit received for completing a continuing education course; health professionals must typically complete a minimum number of credit hours to renew their licenses. | CEU, continuing education unit | number | iHRIS Manage, iHRIS Qualify |
| **currency** | The medium of exchange of money used in a country or other location. | - | selection | iHRIS Manage, iHRIS Plan |
| **currency code** | The unique three-letter code used to define a currency established by the International Organization for Standards (ISO). | - | text entry | iHRIS Manage, iHRIS Plan |
| **currency symbol** | The symbol used to identify a currency, such as dollars. | symbol | text entry | iHRIS Manage, iHRIS Plan |
| **date disciplinary action occurred** | The date a professional received a disciplinary notice. | disciplinary action date | date | iHRIS Qualify |
| **data operations manager** | A database management role that is responsible for managing data entry, including verifying and correcting data and updating standard lists in the system. | - | value (Role) | iHRIS Qualify |
| **data source** | The verifiable source of data entered in the system, such as a census, survey or information system. | - | text entry | iHRIS Plan |
| **date added** | The date a note was added to a person's record. | - | date | iHRIS Manage, iHRIS Qualify |
| **date of birth** | A person's birthday. | birthdate | date | iHRIS Manage, iHRIS Qualify |
| **decision maker** | A role that runs reports in order to view and analyze data, and make health workforce policy and planning decisions. | - | value (Role) | iHRIS Qualify |
| **degree** | Certifies that a particular academic level has been achieved, usually a higher education program. | - | selection | iHRIS Manage |
| **department** | A division within an organization, typically around similar job functions and following supervisory lines. | - | selection | iHRIS Manage |
| **dependent** | A legal dependent, such as a spouse or child. | number of dependents | number | iHRIS Manage |
| **deployment date** | The date a person is employed in a health facility as a licensed health worker. | deployment | date | iHRIS Qualify |
| **description** | Additional information about or a definition of an item used in selection menus. | job description | text entry | iHRIS Manage, iHRIS Plan |
| **desired wage** | The salary that an applicant for a job requests to perform that job. | desired salary | selection (from Currency) + number | iHRIS Manage |

| | | | | |
|---|---|---|---|---|
| **did not sit for exam** | An incomplete or absent result on a qualifying examination. | absent, incomplete | value (Exam Results) | iHRIS Qualify |
| **disciplinary action reason** | A warning or notice issued to a health professional or employee as a result of an infraction. | disciplinary action, disciplinary notice | selection | iHRIS Qualify |
| **discontinued** | A position status that designates a position that is no longer required by an organization; no employee fills it and the organization is not soliciting applications for the position. | discontinued position | value (Position Status) | iHRIS Manage |
| **display name** | The name of a report or other item that is shown to users of the system. | - | text entry | iHRIS Manage, iHRIS Qualify |
| **disruption date** | The date a student left a training program. | - | date | iHRIS Qualify |
| **disruption reason** | The reason why a student left a training program. | discontinuation, disruption, training disruption | selection | iHRIS Qualify |
| **district** | A smaller geographic unit within a region created by the central government for easy administration. | province, state | selection | iHRIS Manage, iHRIS Qualify |
| **duration of change** | The number of years that a change affects a workforce projection | - | number | iHRIS Plan |
| **education type** | The type of qualification or degree a person has received, such as college/university, continuing education or informal. | - | selection | iHRIS Manage |
| **elementary** | The first level of five in the Interagency Language Roundtable (ILR) scale of language proficiency; a person at this level has a speaking vocabulary which is inadequate to express anything but the most elementary needs. | elementary proficiency, Level 1, S-1 | value (Speaking, Reading or Writing Proficiency) | iHRIS Manage |
| **email address** | An address where a person or organization can be contacted by email. | email | text entry | iHRIS Manage, iHRIS Qualify |
| **emergency contact** | The person to notify if there is an emergency involving an employee, including the person's contact information. | - | value (Contact Type) | iHRIS Manage, iHRIS Qualify |
| **employee** | A person who is paid by an organization to perform a specific job. | - | value (from Employee Status) | iHRIS Manage |
| **employee status** | The status of an employee with the organization, such as a current employee, old employee or job applicant. | - | selection (preset values) | iHRIS Manage |
| **enabled** | Refers to whether a pool change is calculated and displayed in a projection. | - | yes/no | iHRIS Plan |
| **end date** | The date at which a position, training program, licensing period, etc. ends. | date ended, expiration, license expiration date | date | iHRIS Manage, iHRIS Qualify |
| **ending position** | The last position that a person held in an organization. | - | text entry | iHRIS Manage |

| | | | | |
|---|---|---|---|---|
| **ending salary** | The salary that a person earned in the last position s/he held in an organization; also the highest salary in a salary grade. | end, end salary, ending wage, last salary | selection (from Currency) + number | iHRIS Manage |
| **endorser date** | The date a student is endorsed to take the national examination. | - | date | iHRIS Qualify |
| **endorser name** | A person who recommends a student graduating from a training program to take the national examination. | endorser | text entry | iHRIS Qualify |
| **endorser qualifications** | The qualifications of a person recommending students to take the national examination. | - | text entry | iHRIS Qualify |
| **evaluation** | An official assessment of an employee's performance in a class or competency. | competency evaluation, training course evaluation | selection | iHRIS Manage |
| **exam date** | The date that the qualifying examination is administered to health profession students. | - | date | iHRIS Qualify |
| **exam number** | The number that identifies a particular examination administered to a student graduating from a health training program. | - | text entry | iHRIS Qualify |
| **exam results** | The grade received on the test that every student graduating from a health training program must pass in order to qualify for registration. | exam, examination, national examination, results | selection (preset values) | iHRIS Qualify |
| **exam try** | An attempt by a student to pass the qualifying examination; students are limited to three tries. | - | selection (preset values) | iHRIS Qualify |
| **executive manager** | A person who may manage the entire organization or one district, department, office or facility within the organization. The Executive Manager views reports and analyzes data entered in the system in order to make HR decisions and set organizational policy. | - | value (Role) | iHRIS Manage |
| **exit** | A decrease in the supply of workers due to employees leaving the workforce. | - | selection (preset values) | iHRIS Plan |
| **facility** | A specific division within an organization that is defined by having its own budget and often has a unique facility code. Often a facility is responsible for providing health care services. | duty center, health facility, office, responsibility center | selection | iHRIS Manage, iHRIS Qualify |
| **facility agent** | The owner of a health facility or training institution, which also refers to the classification of the facility. | agent | selection | iHRIS Qualify |
| **facility type** | A type of health facility. | - | selection | iHRIS Manage, iHRIS Qualify |
| **fax number** | A number where a person or organization can be contacted by fax. | fax | text entry | iHRIS Manage, iHRIS Qualify |
| **fail** | A failing grade on a qualifying examination. | - | value (Exam Results) | iHRIS Qualify |
| **felony conviction** | A conviction of a crime resulting in prison time. | - | yes/no | iHRIS Manage |
| **final try** | The third and last attempt to pass the qualifying examination. | - | value (Exam Try) | iHRIS Qualify |
| **first name** | A person's initial name. | Christian name, firstname, given name, name | text entry | all |

| | | | | |
|---|---|---|---|---|
| **first try** | The initial attempt to pass the qualifying examination. | - | value (Exam Try) | iHRIS Qualify |
| **fluent** | Native of bilingual proficiency in a language. | bilingual proficiency, Level 5, native proficiency, S-5 | value (Speaking, Reading or Writing Proficiency) | iHRIS Manage |
| **full professional** | The fourth level of five in the Interagency Language Roundtable (ILR) scale of language proficiency; a person at this level is able to use the language fluently and accurately on all levels normally pertinent to professional needs. | full professional proficiency, Level 4, S-4 | value (Speaking, Reading or Writing Proficiency) | iHRIS Manage |
| **full-time employment** | Employment for a standard number of hours of working time. | full-time | yes/no | iHRIS Manage |
| **gender** | Indicates whether a person is male or female. | sex | female/male | iHRIS Manage, iHRIS Qualify |
| **grade obtained** | A student's official grade upon completing a particular academic level. | grade | text entry | iHRIS Qualify |
| **graduation date** | Official date of completion of a training program or other educational program. | graduation, year of graduation | date | iHRIS Manage, iHRIS Qualify |
| **health workforce planner** | A role that has access to the projection creation and modeling functions but cannot configure the system or access user accounts. | - | value (Role) | iHRIS Plan |
| **hiring date** | The date on which an open position is filled. | filled date, hire date, hire year | TBD | iHRIS Manage |
| **hiring decision** | The date at which an official decision is made whether to offer a job to an applicant. | date of decision | date | iHRIS Manage |
| **home residence** | The address or geographical location where a person permanently lives, which may be different from the person's current residence. | permanent residence | selection (Country + Region + District) | iHRIS Qualify |
| **HR manager** | A manager of human resources personnel who is responsible for managing all system data and for ensuring that data in the system are complete, correct and up to date. | - | value (Role) | iHRIS Manage |
| **HR staff** | A data entry person in human resources who is responsible for entering and updating data in the system. | - | value (Role) | iHRIS Manage |
| **identification code** | A unique code used to identify a facility or training institution. | - | text entry | iHRIS Qualify |
| **identification number** | The unique identifier -- usually a number -- that, when combined with an Identification Type, is used to identify a person. | - | text entry | iHRIS Manage, iHRIS Qualify |
| **identification type** | An official document (such as Social Security Number, national health insurance or passport) used to identify a person. | identification | selection | iHRIS Manage, iHRIS Qualify |
| **index number** | The number issued to a student when s/he enters a new pre-service training program. | index | TBD | iHRIS Qualify |

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| **initial year of change** | The first year in a projection that a pool change takes effect; the initial year of change may be the same as the start year of the projection. | initial year | year | iHRIS Plan |
| **inspection date** | The date when an institution was last inspected. | - | date | iHRIS Qualify |
| **inspection results** | Certification that a health facility, private practice clinic or training institution is qualified to provide services. | inspection, institution inspection | text entry | iHRIS Qualify |
| **instructor** | The teacher of a training class. | teacher, trainer | text entry | iHRIS Manage |
| **intake** | An increase in the supply of workers due to employees entering the workforce. | - | selection (preset values) | iHRIS Plan |
| **intake date** | The date a person enters a training program. | - | date | iHRIS Qualify |
| **interview date** | The date at which a formal meeting to assess the qualifications of a job applicant takes place. | date of interview, interview | date | iHRIS Manage |
| **ISCO classification code** | A unique code that identifies a job classification using a standard coding system established by the International Standard Classification of Occupations (ISCO) for classifying professions. | - | text entry | iHRIS Qualify |
| **ISO numeric code** | The unique numeric code that identifies a country established by the International Organization for Standards (ISO). | - | text entry | all |
| **job** | A general set of qualifications, duties and responsibilities that matches a particular job description and has a unique job code. There may be multiple instances of the same job within an organization. | designation, post | selection (from Job Title) | iHRIS Manage, iHRIS Qualify |
| **job code** | A unique identifier associated with a particular job that identifies it for the organization. | post code | text entry | iHRIS Manage, iHRIS Qualify |
| **job offer** | An offer to hire an applicant for a particular position and salary. | make a job offer, offer | yes/no | iHRIS Manage |
| **job responsibilities** | The duties expected to be performed by a particular job. | duties, responsibilities | text entry | iHRIS Manage |
| **job title** | The label used to describe a job, or a specific set of duties and responsibilities. | post title, title | text entry | iHRIS Manage, iHRIS Qualify |
| **language** | A foreign language other than a person's native language. | - | selection | iHRIS Manage |
| **last evaluated** | The date at which a person last received an evaluation. | - | date | iHRIS Manage |
| **license number** | The number issued with a license to practice as a health worker; this number may or may not be identical to the registration number. | - | number | iHRIS Manage, iHRIS Qualify |

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| **limited working** | The second level of five in the Interagency Language Roundtable (ILR) scale of language proficiency; a person at this level is able to satisfy routine social demands and limited work requirements. | Level 2, limited working proficiency, S-2 | value (Speaking, Reading or Writing Proficiency) | iHRIS Manage |
| **location** | Refers to the country, region, district and (optionally) county where an organization, institution or facility is located. | geographical location, institution location | selection (from Country + Region + District + County) | iHRIS Manage, iHRIS Qualify |
| **location selection** | Designates a country that is used for determining geographical location, in addition to selecting a currency or nationality. | - | yes/no | iHRIS Manage, iHRIS Qualify |
| **mailing address** | An address, including city, country and zip code, where a person or organization can be contacted by mail. | address | text entry | iHRIS Manage, iHRIS Qualify |
| **major** | Primary field of study. | - | text entry | iHRIS Manage |
| **marital status** | A person's legal status, such as single, married, divorced or widowed. | - | selection | iHRIS Manage, iHRIS Qualify |
| **materials approved** | Approval of examination application materials. | - | yes/no | iHRIS Qualify |
| **materials received** | Examination application materials submitted by an applicant in advance of taking the exam. | - | yes/no | iHRIS Qualify |
| **maximum amount of change** | The maximum number of health workers that can enter the workforce in a projection. | - | number | iHRIS Plan |
| **maximum number of students** | The largest number of students accepted into a training course. | - | number | iHRIS Manage |
| **midpoint** | The average salary offered to new hires in a salary grade, which may not be equivalent to the true average of the salary range within that grade. | - | selection (from Currency) + number | iHRIS Manage |
| **monthly** | An event that occurs once a month. | - | value (Recurrence Frequency) | iHRIS Manage |
| **name** | Refers to the value used to create an item for selection menus. | - | text entry | all |
| **nationality** | The country where a person is a legal citizen. | citizenship | selection (from Country) | iHRIS Manage, iHRIS Qualify |
| **no access** | A role that prevents a user from accessing the system, or disables the user account. | - | value (Role) | all |
| **notes** | General information added to a record to provide additional information not accounted for by other fields. | primary contact person | text entry | iHRIS Manage, iHRIS Qualify |
| **number of employed staff** | The actual number of workers available for deployment. | supply | number | iHRIS Plan |

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| **number of students** | The maximum number of students that can attend a specific training program. | - | number | iHRIS Qualify |
| **OK to contact** | Specifies whether a person's past employers may be contacted. | - | yes/no | iHRIS Manage |
| **old applicant** | A person who previously applied for an open position, but who has not applied for any positions that are currently open. | - | value (from Employee Status) | iHRIS Manage |
| **old employee** | A person who previously worked for an organization but has left the organization. | - | value (from Employee Status) | iHRIS Manage |
| **once** | An event that occurs only once, or does not recur. | - | value (Recurrence Frequency) | iHRIS Manage |
| **open** | A position status that designates a position that is required for the organization to operate and that the organization is actively hiring to fill. | open position | value (Position Status) | iHRIS Manage |
| **organization requesting verification** | The certifying board or professional council requesting the qualifications of a health worker who is applying to work in a foreign country. | - | text entry | iHRIS Qualify |
| **other** | Refers to all values other than those not explicitly listed for selection. | other contact | value (Contact Type) | iHRIS Manage, iHRIS Qualify |
| **other names** | A person's names other than the first name and surname, usually one or more middle names. | middle name, other name | text entry | all |
| **out migration reason** | The given by a health worker leaving the country where s/he was trained in order to practice in a foreign country. | out migration | selection | iHRIS Qualify |
| **pass** | A passing grade on a qualifying examination or on a facility inspection. | passed | value (Exam Results) or yes/no | iHRIS Qualify |
| **password** | A hidden phrase that provides secure access to the system. | - | text entry | all |
| **people attending** | The names of the people who attend a job interview. | interviewers | text entry | iHRIS Manage |
| **percentage change** | An annual change in the number of workers based on a percentage of the available number of workers leaving or entering the workforce. | rate of change | number | iHRIS Plan |
| **permanent** | A registration type that does not expire. | - | value (Registration Type) | iHRIS Qualify |
| **personal contact** | Refers to a person's home mailing address, telephone and other contact information. | home, personal | value (Contact Type) | iHRIS Manage, iHRIS Qualify |
| **pool change** | A change applied to a cadre pool that calculates either an increase or decrease in the number of available health workers in that pool. | - | selection | iHRIS Plan |
| **population** | The total number of people inhabiting a specific area, such as a country. | - | number | iHRIS Plan |
| **population growth rate** | The percentage by which the population of an area will grow annually. | growth rate, population growth | number | iHRIS Plan |

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| **position** | An instance of a job that can be filled by one employee in one facility and represents one box on an organizational chart. | - | selection (from Position Code + Position Title) | iHRIS Manage |
| **position code** | A unique identifier associated with a particular position that identifies it for the organization. | - | text entry | iHRIS Manage |
| **position description** | The specific responsibilities for a particular position in addition to the general responsibilities for the job. | - | text entry | iHRIS Manage |
| **position status** | The status of a position as open, closed (filled) or discontinued. | status | selection (preset values) | iHRIS Manage |
| **position title** | A specific title different from the job title that defines one particular position within an organization. | title | text entry | iHRIS Manage |
| **position type** | A classification of a type of position. | - | selection | iHRIS Manage |
| **post date** | The date a position is opened for hiring. | date posted, posted date | date | iHRIS Manage |
| **practice type** | The type of registration issued to a health worker. | - | selection (preset values) | iHRIS Qualify |
| **primary country** | The country that is selected as the primary location for data in the system; more than one country may be set as the primary country. | - | yes/no | all |
| **primary form** | The form, or related set of data entry fields, on which a report relationship is based. | - | selection | iHRIS Manage, iHRIS Qualify |
| **professional working** | The third level of five in the Interagency Language Roundtable (ILR) scale of language proficiency; a person at this level is able to speak the language with sufficient structural accuracy and vocabulary to participate effectively in most conversations on practical, social and professional topics. | Level 3, professional working proficiency, S-3 | value (Speaking, Reading or Writing Proficiency) | iHRIS Manage |
| **projection duration** | The number of years in a projection, usually between 5 and 30 years. Also refers to the number of years that a pool change affects the projection. | duration | number | iHRIS Plan |
| **projection name** | A calculation of the workforce supply and required workers over time based on workforce data and assumptions made about future changes to the workforce that compares the supply to the requirements and shows the gap between the two. | graphical model, projection, workforce projection | text entry | iHRIS Plan |
| **proposed end date** | Date at which funding or the role for a position is tentatively scheduled to end, as distinguished from the end date. | - | date | iHRIS Manage |
| **proposed hiring date** | Date at which an organization would like to fill an open position, as distinguished from the actual hiring date. | - | date | iHRIS Manage |
| **proposed salary** | The salary that is proposed for an open position before it has been filled; does not refer to the actual salary for the position. | - | selection (from Currency) + number | iHRIS Manage |
| **qualification** | Specific educational level, training, competency, skill or experience that a person must have in order to enter a training program, become registered in a cadre or perform a job. | education, minimum qualification required, skill | selection or text entry (job application) | iHRIS Manage, iHRIS Qualify |

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| **rate amount of change increases each year** | The percentage by which the annual change in the number of health workers increases annually. | - | number | iHRIS Plan |
| **reading proficiency** | A person's reading ability in a foreign language. | - | selection (preset values) | iHRIS Manage |
| **reason for departure** | A reason given for leaving employment or changing positions within the organization. | reason for leaving | selection; text entry (past employment) | iHRIS Manage |
| **records officer** | A role that is responsible for basic data entry, including initial indexing and upgrades of health professional students entering training programs, tracking out migration verifications and demographic data entry. | - | value (Role) | iHRIS Qualify |
| **recurrence frequency** | A regular repetition of a special payment, such as monthly or annually. | recurrence | selection (preset values) | iHRIS Manage |
| **region** | A major subdivision of a country containing districts. | - | selection | iHRIS Manage, iHRIS Qualify |
| **registration council** | An organization that registers or licenses health workers to practice in a country. | council, licensing board | selection | iHRIS Manage |
| **registration date** | The date at which a health worker is issued a registration number. | - | date | iHRIS Manage, iHRIS Qualify |
| **registration number** | A number that is issued when a health worker enters the profession within a particular cadre; the health worker retains the registration number as the primary identification number as long as s/he is licensed to practice in that cadre in the country. | - | number | iHRIS Manage, iHRIS Qualify |
| **registration supervisor** | A role that is responsible for data entry related to licensing updates, including entering initial registration, issuing new licenses and license renewals, issuing and renewing private practice licenses, and registering and licensing foreign-trained health care professionals applying to work in the country. | - | value (Role) | iHRIS Qualify |
| **reinstatement date** | The date a license is reissued to a health worker after a suspension due to a disciplinary action. | reinstatement | date | iHRIS Qualify |
| **report** | Display of data from the system as a table or graphical chart; typically, filters can be set on a report to determine the range of data displayed. | - | selection | iHRIS Manage, iHRIS Qualify |
| **report relationship** | A defined relationship between system forms on which a report is based. | form relationship, relationship | selection | iHRIS Manage, iHRIS Qualify |
| **request date** | The date that official documentation is requested. | - | date | iHRIS Qualify |
| **residence** | The location where a person is currently living; this may be different than the person's home residence. | current residence | selection (from Country + Region + District) | iHRIS Manage, iHRIS Qualify |

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| **resumption date** | The date a student returned to a training program that was previously disrupted. | resumption | date | iHRIS Qualify |
| **re-try** | The second attempt to pass the qualifying examination. | - | value (Exam Try) | iHRIS Qualify |
| **role** | Determines the activities that a user can perform within the system. | - | selection (preset values) | all |
| **salary** | The amount an employee is paid per year for a particular job. | current salary, wage | selection (from Currency) + number | iHRIS Manage |
| **salary grade** | Defines pay ranges for one or more jobs. | band, grade, salary band | selection | iHRIS Manage |
| **salary increase** | The amount that a salary is increased each year, expressed as a percentage of the salary. | - | number | iHRIS Plan |
| **salary source** | A monetary source for an employee's salary or special payments that is not the employing organization, such as a donor or nonprofit. | source | selection | iHRIS Manage |
| **secondary school name** | The school attended before entering a training institution. | high school | TBD | iHRIS Qualify |
| **shortname** | A unique name used to refer to a report. | relationship short name | text entry | iHRIS Manage, iHRIS Qualify |
| **site** | The location where a training class is given. | - | text entry | iHRIS Manage |
| **speaking proficiency** | A person's speaking ability in a foreign language. | - | selection (preset values) | iHRIS Manage |
| **start date** | The date at which a training program, position, license, etc. begins. | date started | date | iHRIS Manage, iHRIS Qualify |
| **start year** | The year in which a projection of the workforce begins, for which there is known workforce data. | base year | year | iHRIS Plan |
| **starting position** | The position that a person held when first employed by an organization. | - | text entry | iHRIS Manage |
| **starting salary** | The salary that a person earned when first employed by an organization; also the lowest salary in a salary grade. | first salary, start, start salary, starting wage | selection (from Currency) + number | iHRIS Manage |
| **static change** | An annual change in the number of workers based on a specific number of workers leaving or entering the workforce. | amount of change | number | iHRIS Plan |
| **status** | The current state of an institution, facility or training course (typically open or closed). | facility status, training course status | selection | iHRIS Manage, iHRIS Qualify |
| **supervisor** | A person who manages one or more employees of a lower grade. | manager | text entry (for past employers); selection (from Position Code + Position Title) | iHRIS Manage |
| **surname** | A family name or last name. | last name | text entry | all |

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| **suspend license** | To revoke a health worker's license as a result of a disciplinary notice. | suspend, suspension | yes/no | iHRIS Qualify |
| **targeted goals for the workforce** | A goal or proposed outcome for workforce plans or projections, such as to meet a specific need or staff up to a certain level. | goals | text entry | iHRIS Plan |
| **targeted number of positions** | The number of health workers necessary to meet the health service need. | need, requirements, target | number | iHRIS Plan |
| **targeted ratio of positions** | A targeted number of health workers based on a ratio of one health worker per a certain number of people to be served. | health worker-to-population ratio, targeted ratio | number | iHRIS Plan |
| **telephone number** | A number where a person or organization can be contacted by telephone. | phone number, telephone | text entry | iHRIS Manage, iHRIS Qualify |
| **temporary** | A registration type that does expire. | - | value (Registration Type) | iHRIS Qualify |
| **topic** | The specific subject of a training course. | subject | text entry | iHRIS Manage |
| **training course** | An in-service program offered by a training institution that enables an employee to update or add to skills necessary for performing a job. | course, in-service training, training | selection | iHRIS Manage, iHRIS Qualify |
| **training funder** | A nonprofit or other funding organization that pays for employees to take a training course. | funder | selection | iHRIS Manage |
| **training institution** | A school that offers one or more programs to train employees, especially health workers. | institution, institution name, school | selection; text entry (for educational history or foreign training) | iHRIS Manage, iHRIS Qualify |
| **training manager** | A person who is responsible for managing in-service training programs for employees and updating employee competencies gained by training. | - | value (Role) | iHRIS Manage |
| **training program** | A pre-service, multi-year educational program offered by a training institution that, when completed, qualifies a person to be registered or licensed in a particular cadre. | pre-service training, training | selection | iHRIS Qualify |
| **training requestor** | The person or group who requests that an employee complete a training course. | requestor | selection | iHRIS Manage |
| **username** | A unique name used by a user to access the system. | - | text entry | all |
| **verification change** | The type of change made to a health worker's record as a result of verifying the record with an outside source. | changes made, verification | selection | iHRIS Qualify |
| **verification date** | The date a change was made to a record as a result of verifying the record with an outside source. | - | date | iHRIS Qualify |
| **view** | A display of data as a table or chart that shows specific fields sorted or aggregated in a pre-specified way; filters may be selected to limit the data displayed in the report view. | report view | text entry | iHRIS Manage, iHRIS Qualify |
| **weekly** | An event that occurs once a week. | - | value (Recurrence Frequency) | iHRIS Manage |

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|---|---|---|---|---|
| **work contact** | Refers to a person's work mailing address, telephone number and other contact information. | work | value (Contact Type) | iHRIS Manage, iHRIS Qualify |
| **writing proficiency** | A person's writing ability in a foreign language. | - | selection (preset values) | iHRIS Manage |
| **year** | The year for which known data are being entered. | supply year, target year | year | iHRIS Plan |
| **yearly** | An event that occurs once a year. | annually | value (Recurrence Frequency) | iHRIS Manage |

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